PPMP

PRACTICE MANAGEMENT SYSTEMS

Version 9 Manual

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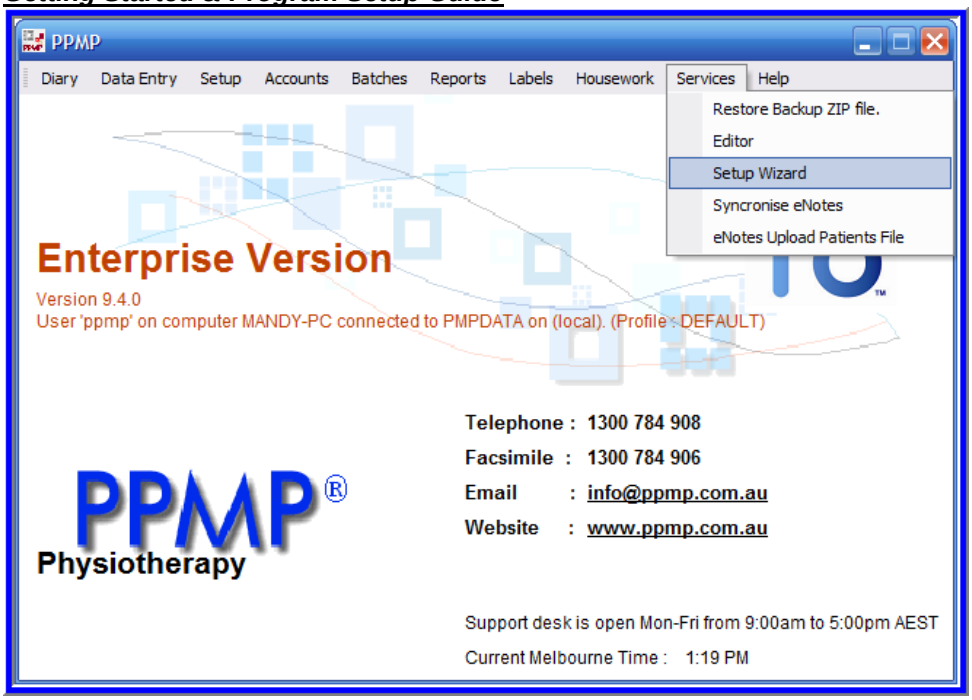
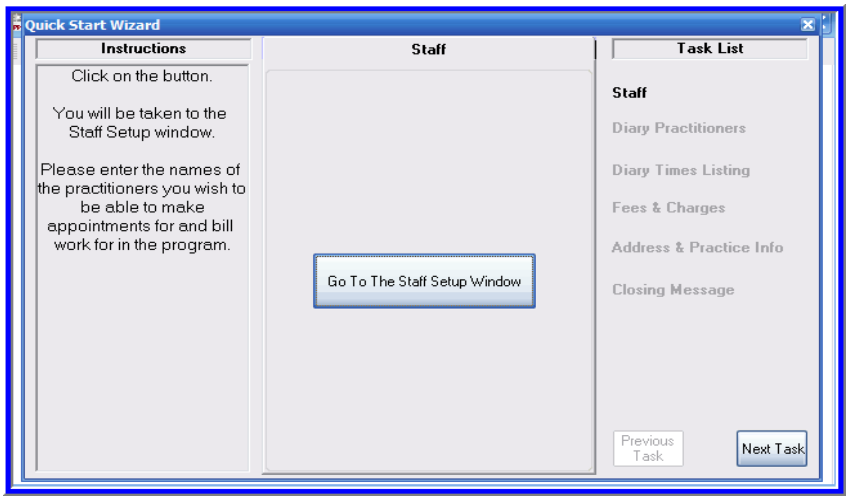
Section 1 - New user setup guide - Program Setup Wizard

Click HERE to watch video

Getting Started & Program Setup Guide

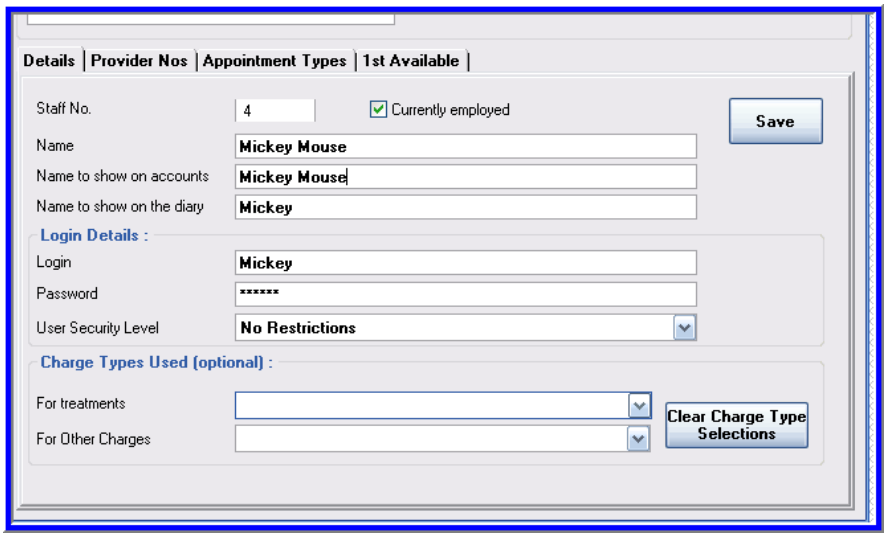


- On the Main PPMP® Screen click on Services
- Select Setup Wizard


Quick Start Wizard
Instructions
Click on the button.
You will be taken to the Staff Setup window.
Please enter the names of the practitioners you wish to be able to make appointments for and bill work for in the program.
Staff
Go To The Staff Setup Window
Task List
Staff
Diary Practitioners
Diary Times Listing
Fees & Charges
Address & Practice Info
Closing Message
Previous Task
Next Task

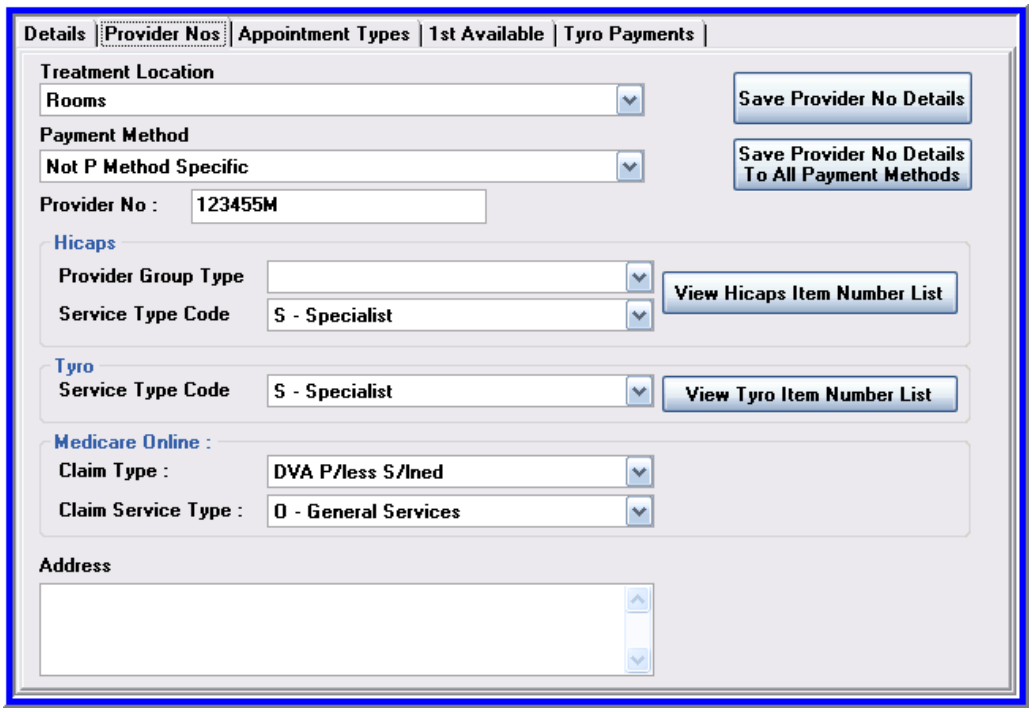
- The above window appears
- Click on Go to the Staff Setup window

- Click Add New

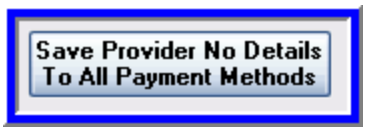


- Enter their FULL NAME & and the name you want to show on the diary

- Click Save (save the changes)
- Click Yes



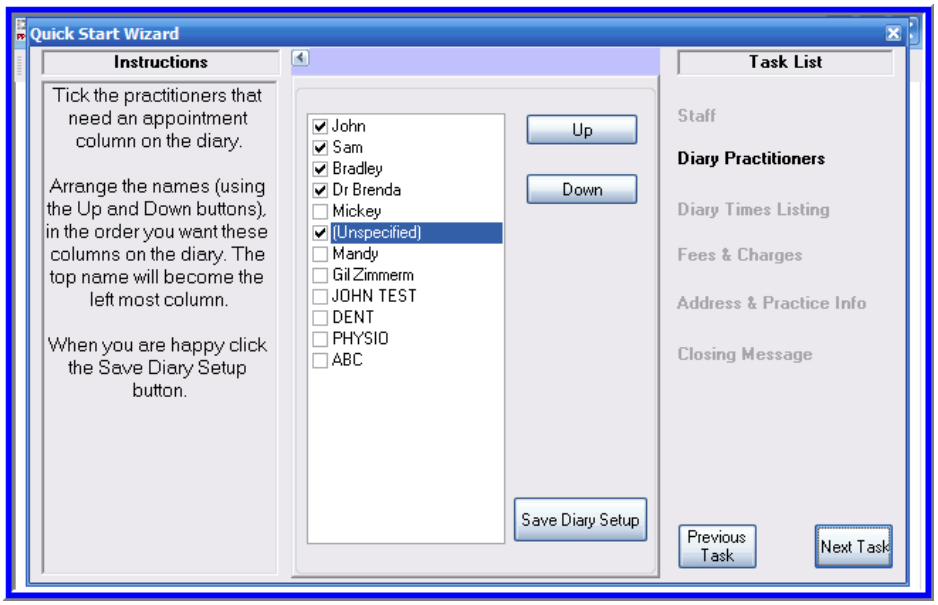
- Click Provider Nos Tab
- Enter Provider Numbers



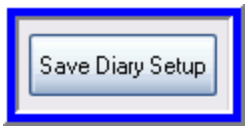
- Click Save Provider No Details to All Payment Methods

- Click exit

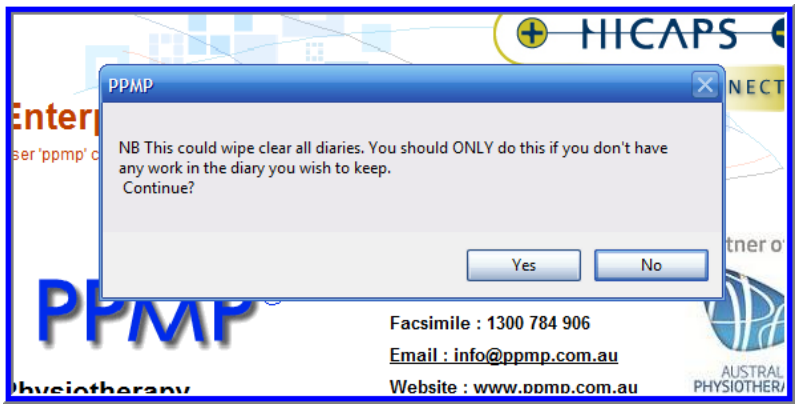
- Click on Next Task



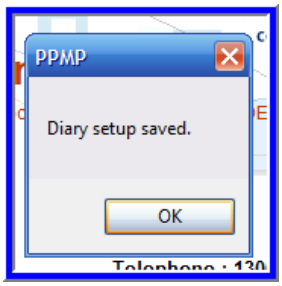
- Select the Practitioners you want displayed on the diary
- Using the Up/Down buttons put them in the order you want them to appear on the diary.
- When you have the columns in the order you want



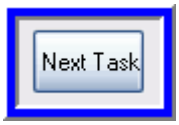
- Click on Save Diary Setup


HICAPS
PPMP
NB This could wipe clear all diaries. You should ONLY do this if you don't have any work in the diary you wish to keep.
Continue?
Yes
No
Facsimile : 1300 784 906
Email : info@ppmp.com.au
Website : www.ppmp.com.au

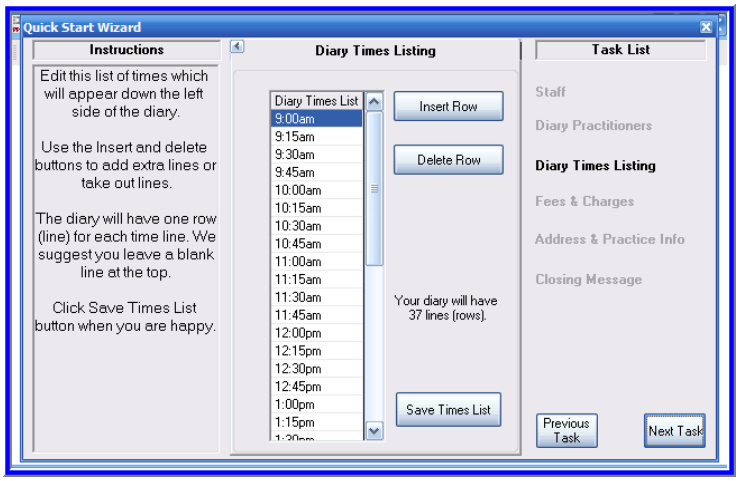
- Click Yes



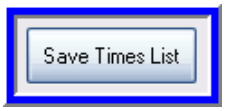
- Click OK



- Click Next Task.

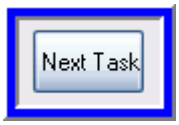


- Diary Times List – using the insert or delete buttons - setup your diary times



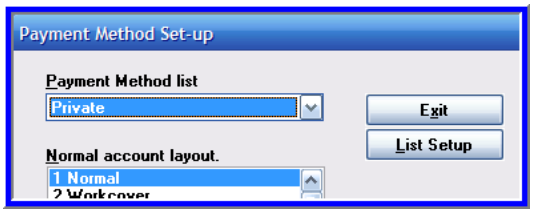
- Click Save Times List.

- Click OK

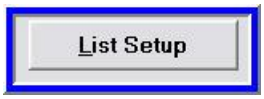


- Click Next Task

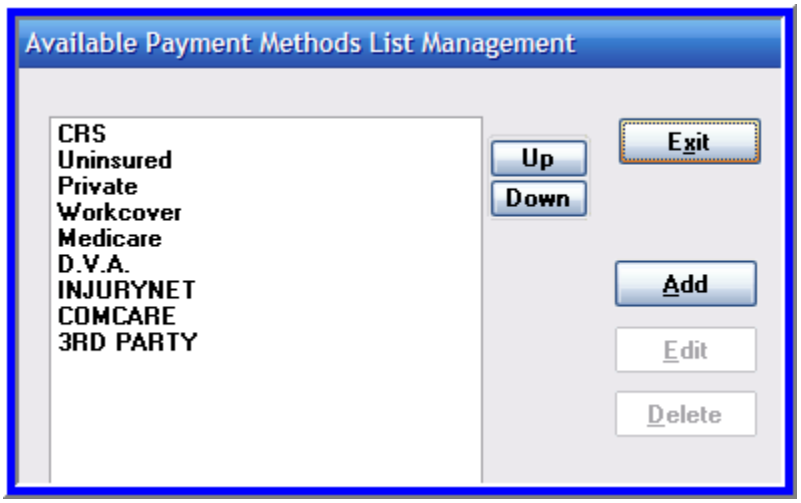
- Click Go to the Fees & Charges Setup Window



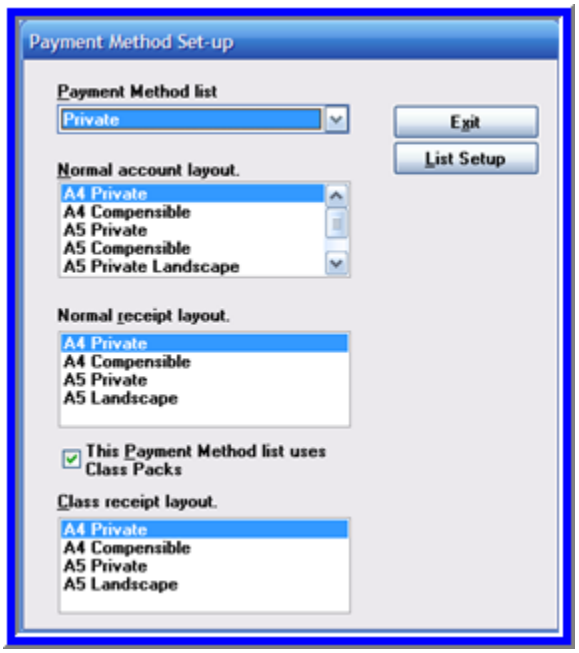
- Click on the set up button for Payment Methods



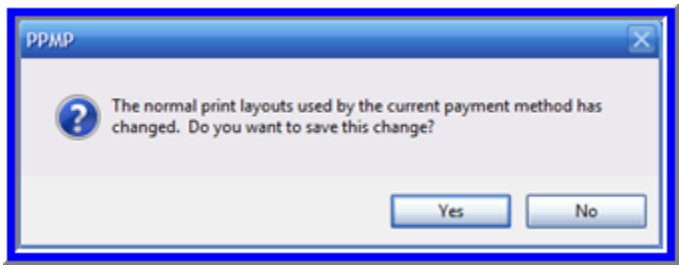
- Click on List Setup



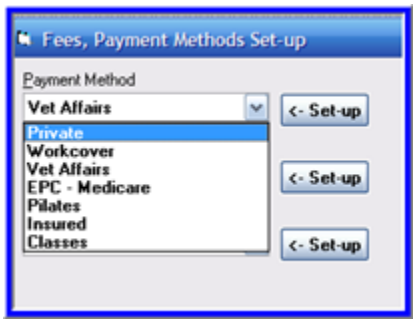
- Add or delete Payment Methods
- Click Add and make your own payment methods list (e.g. Private, Workcover)
- Move these into your order of preference by clicking on a Payment Method and using the up down buttons to move it up or down the list
- Click Exit



- On the Payment Method Setup List select the Account and Receipt Layout designs you would like to use for each Payment Method
- Click Exit

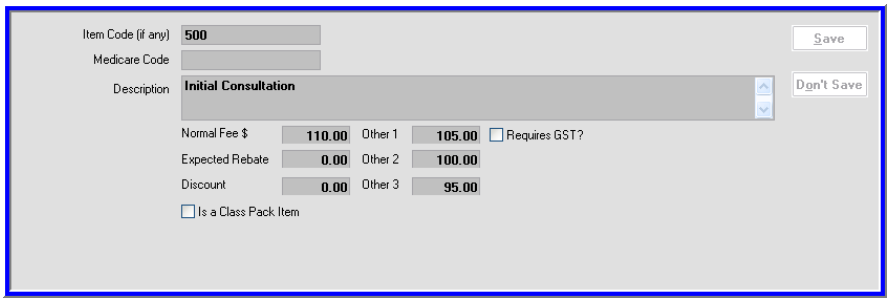


- Save the changes.
- You are now ready to insert your Fees and description and build your list of charges.



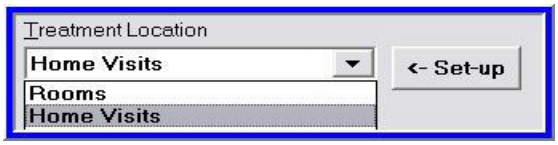
- Select the Payment Method

- Click Add New

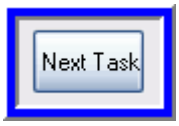


- Type in Item Code, Description and Fee

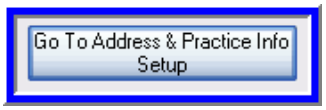
- Click Save
- Continue this process until all your fees and charges have been entered



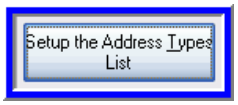
- Remembering to do the same for different locations (if required)
- Click Exit when you have finished this process.



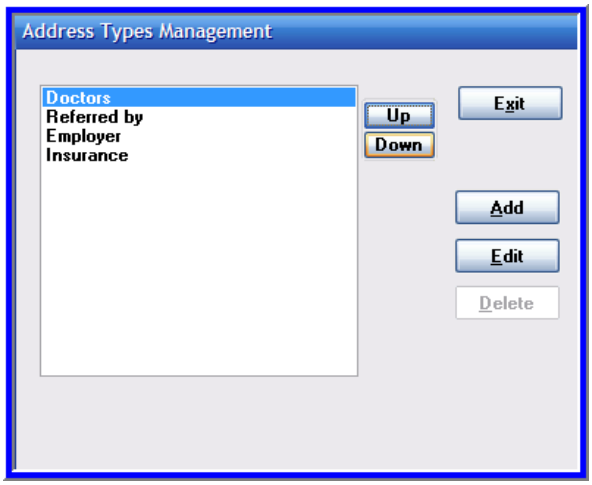
- Click Next Task



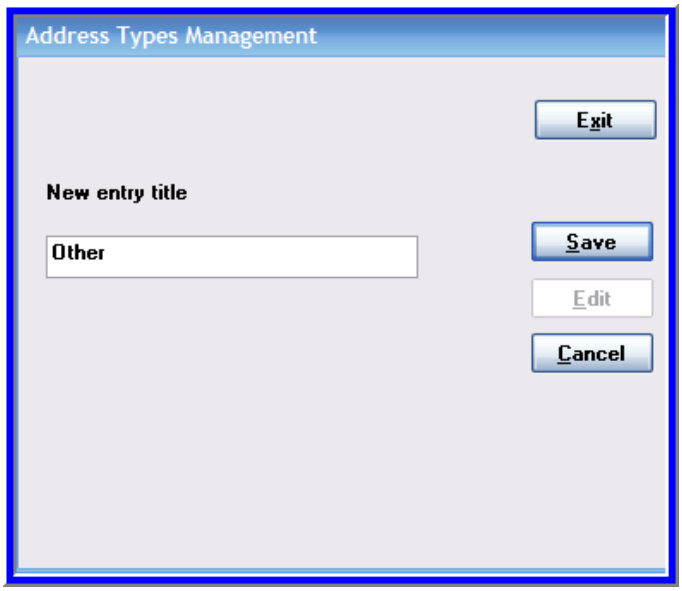
- Click Go To Address & Practice Info Setup



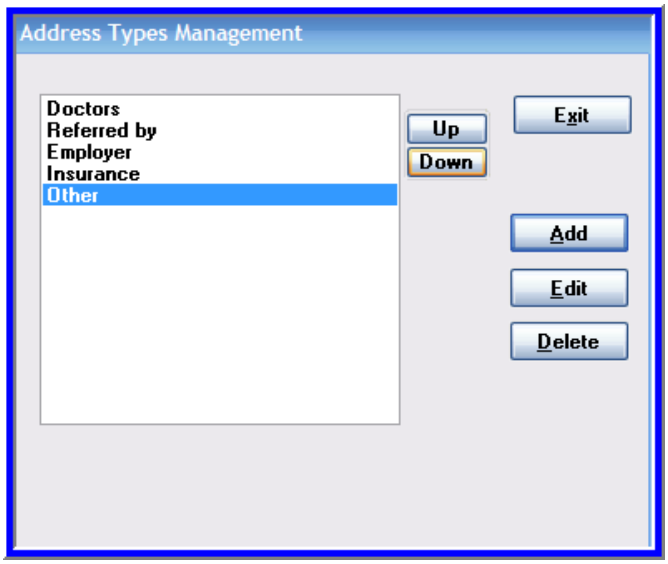
- Click Setup Address Types List to set up your contact details for referrals, work places, insurance companies etc.



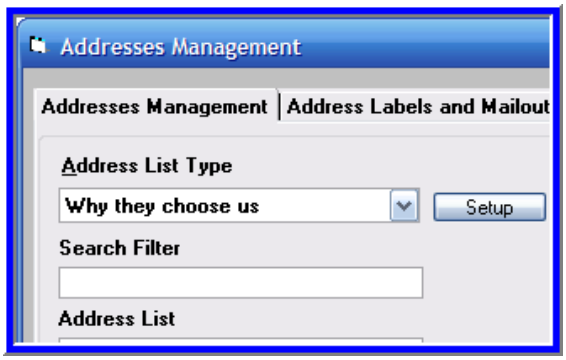
- Click Add and Enter different List Headings



- Click save



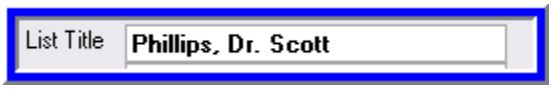
- Use the Up & Down buttons to put these in the order that best suits
- Click Exit



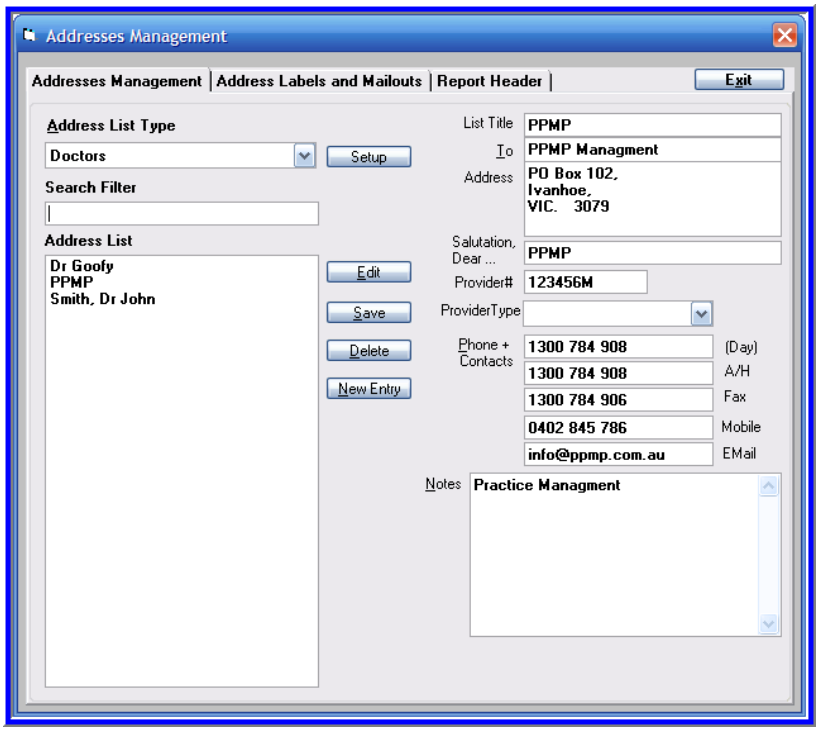
- Select List

- Click New Entry

- In the “To” line – enter the name as it would appear on a letter or envelope

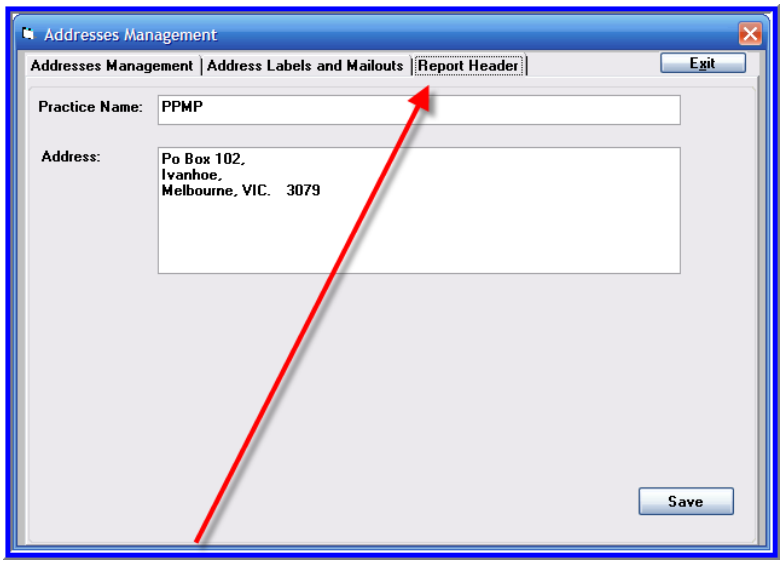


- In the “List Title” – enter the name how to appear on your list (Lastname, Dr. Firstname)
- Add Address information and anything else here you need.

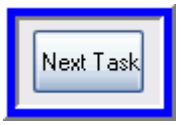


- Click Save

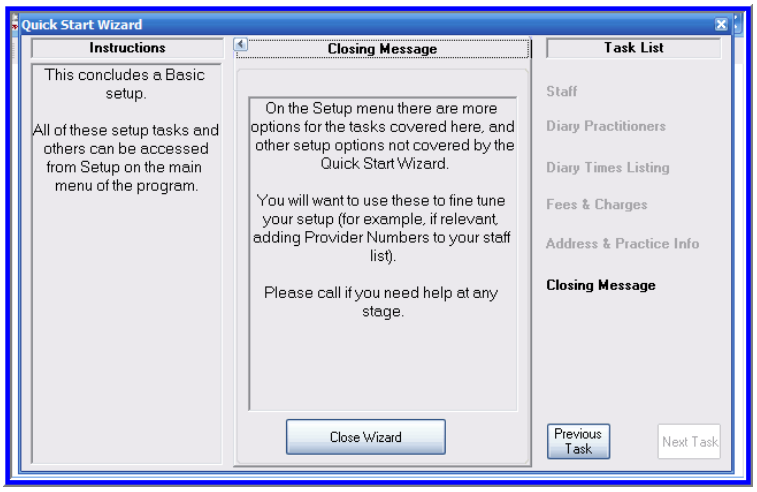
- Continue this way to build your address lists



- When lists are complete click on Reports Header Tab
- Enter in your Pracatice Details
- Click Save & Exit



- Click Next Task

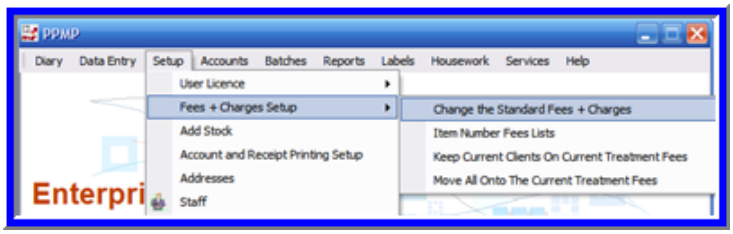

Quick Start Wizard
Instructions
This concludes a Basic setup.
All of these setup tasks and others can be accessed from Setup on the main menu of the program.
Closing Message
On the Setup menu there are more options for the tasks covered here, and other setup options not covered by the Quick Start Wizard.
You will want to use these to fine tune your setup (for example, if relevant, adding Provider Numbers to your staff list).
Please call if you need help at any stage.
Close Wizard
Task List
Staff
Diary Practitioners
Diary Times Listing
Fees & Charges
Address & Practice Info
Closing Message
Previous Task
Next Task

- This concludes the Basic Setup
- Close Wizard

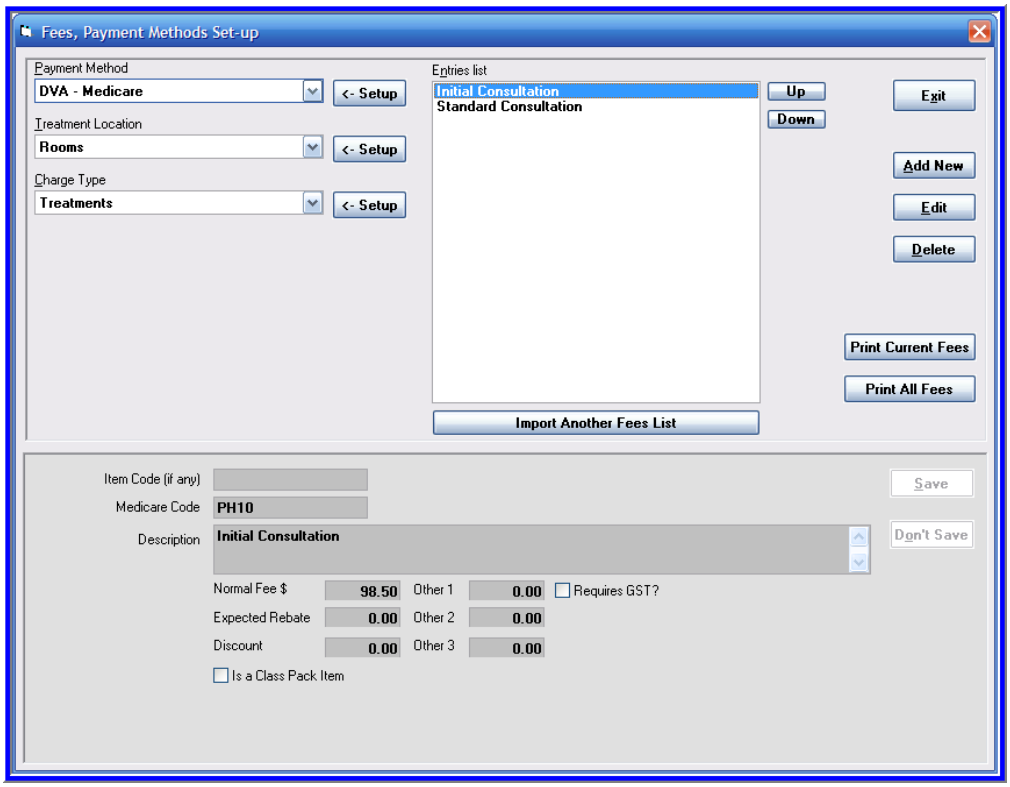
Section 2 –Additional services

1 DVA Procedure

Before we start…

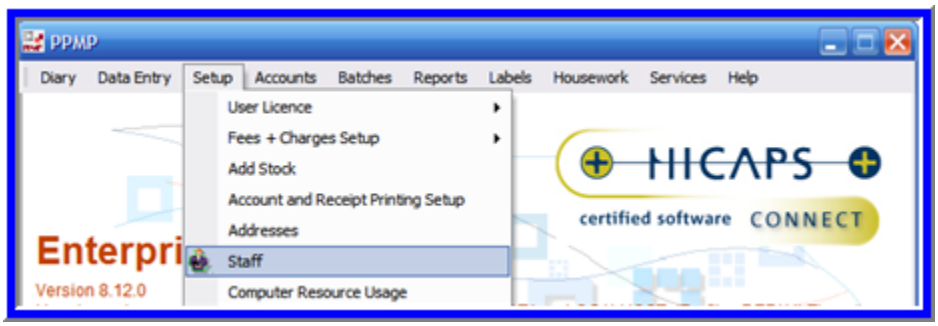


- Go to Setup
- Fees & Charges
- Change the Standard Fees & Charges

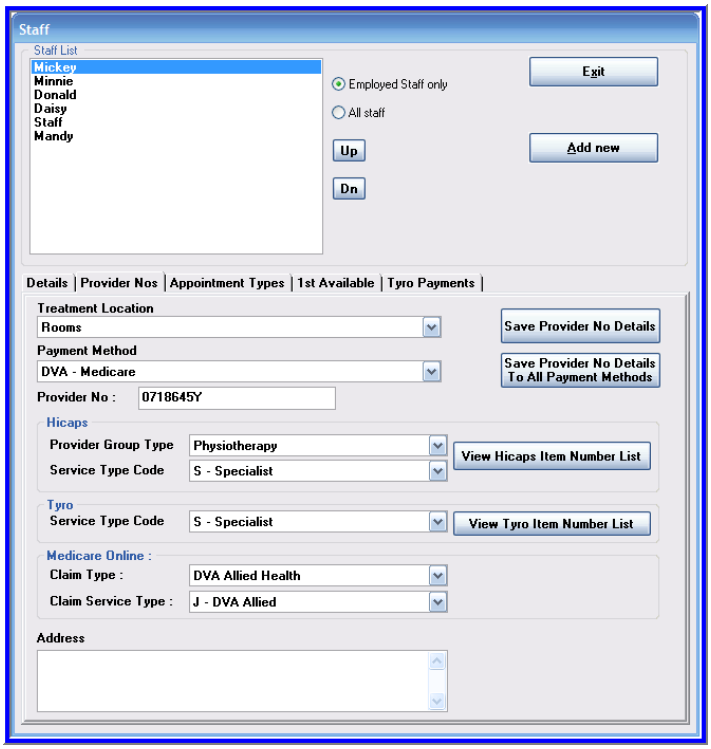


- Under Payment Method select DVA / Medicare
  (If you don't have them already – Add New Payment Methods called Medicare & DVA or Veteran Affairs)
- Make sure ALL Medicare & DVA Payment Methods have the correct information entered (including Item Numbers)
- Click Exit

1.1 Setting up staff



- Go to Setup
- Staff

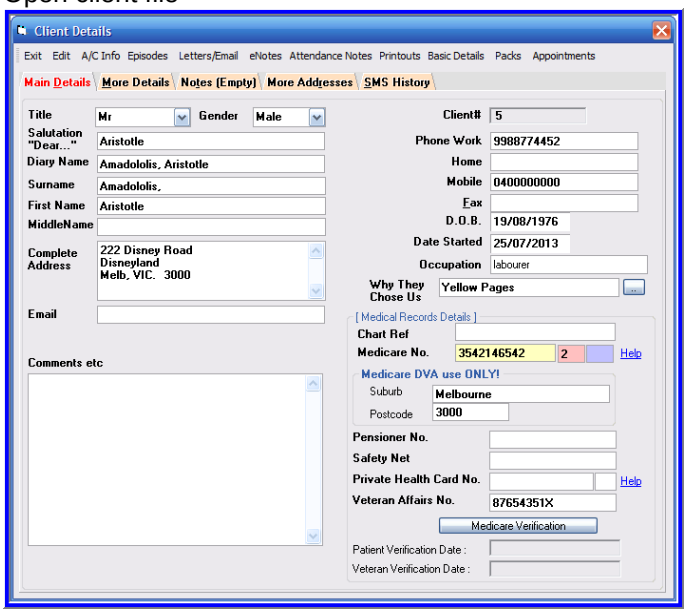


- Select the staff member from the list
- Click Provider No's TAB
- Select the Treatment Location
  (These steps must be repeated for **each** Treatment Location)
- Select Payment Method (DVA – Medicare)
- Enter the Provider Number
- Select Hicaps Provider Group Type (Physiotherapy)
- Select Hicaps Service Type Code (Specialist)
- Select Tyro Service Type Code (Specialist)
- Under MedicareOnline – Claim Type - select DVA Allied Health
- Claim Service Type – Select - J-DVA Allied
  (Unless your Profession is actually listed)
- Press Save Provider No Details to All Payment Methods

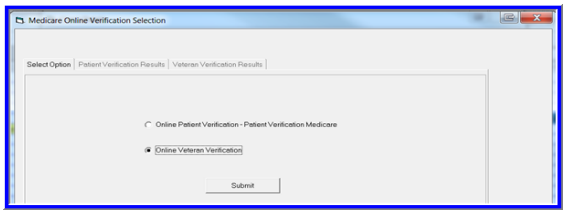
Repeat for each Staff Member & each Treatment Location

1.2 Setting up DVA clients and verification

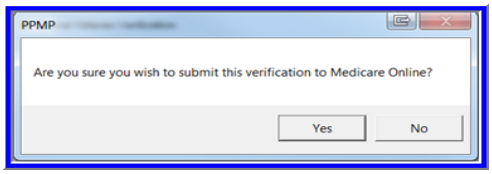
Open client file



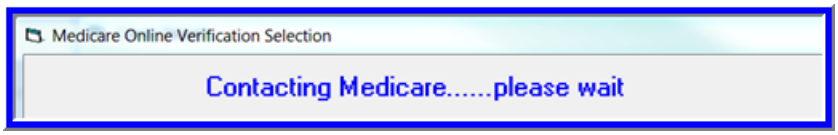
- Enter in ALL Client information
- Enter Medicare DVA requested information (Suburb, Postcode & Veteran's Affair Number)


Medicare Online Verification Selection
Select Option Patient Verification Results Veteran Verification Results
Online Patient Verification - Patient Verification Medicare
Online Veteran Verification
Submit

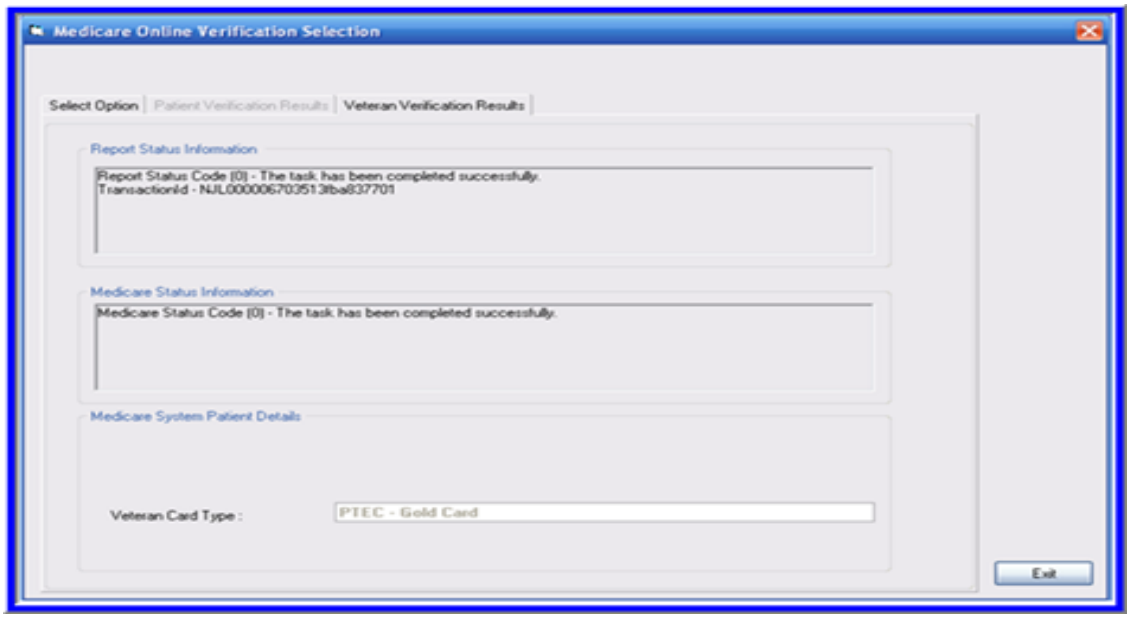
- Select Online Veteran Verification
- Click Submit



- Click Yes

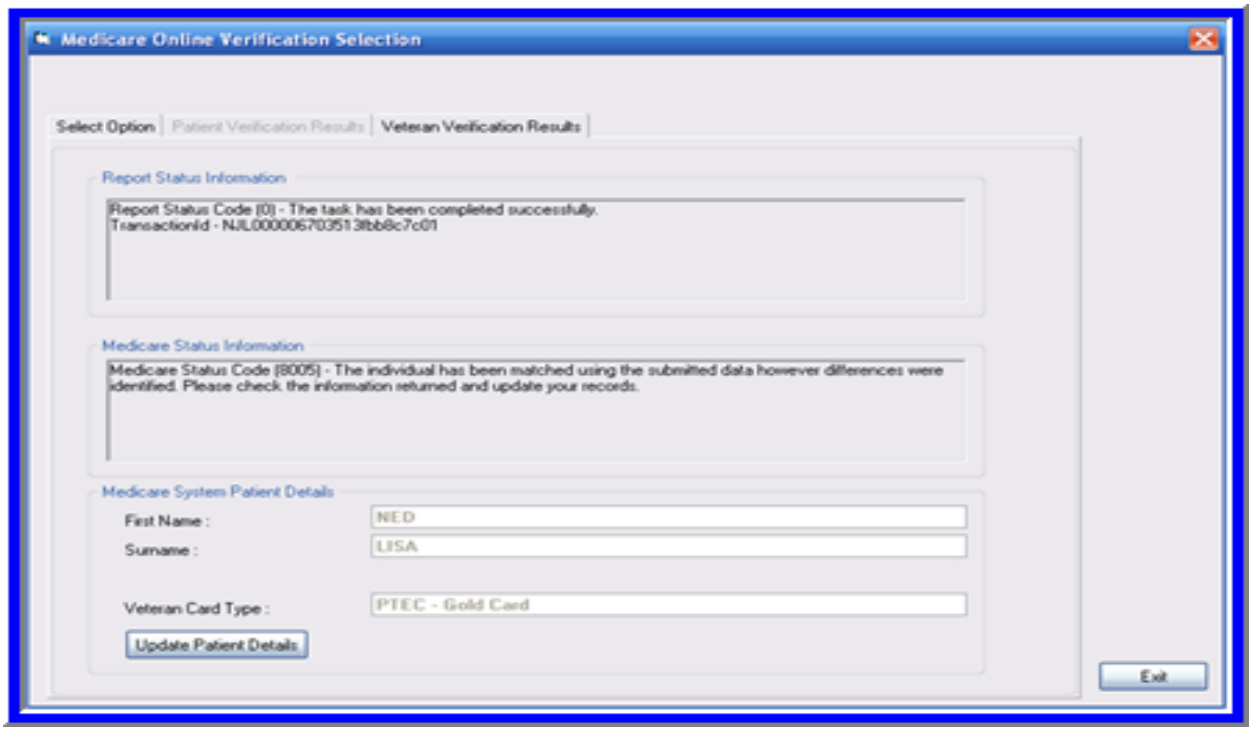


- Your request is being processed…please wait

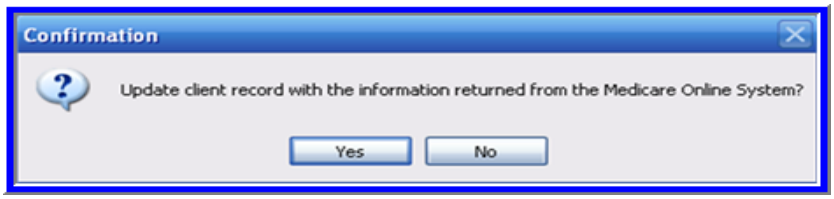

Medicare Online Verification Selection
Select Option
Patient Verification Results
Veteran Verification Results
Report Status Information
Report Status Code [0] - The task has been completed successfully.
TransactionId - NJL000006703513fba837701
Medicare Status Information
Medicare Status Code [0] - The task has been completed successfully.
Medicare System Patient Details
Veteran Card Type :
PTEC - Gold Card
Exit

- Check the Results (The task has been completed successfully)
- Click Exit

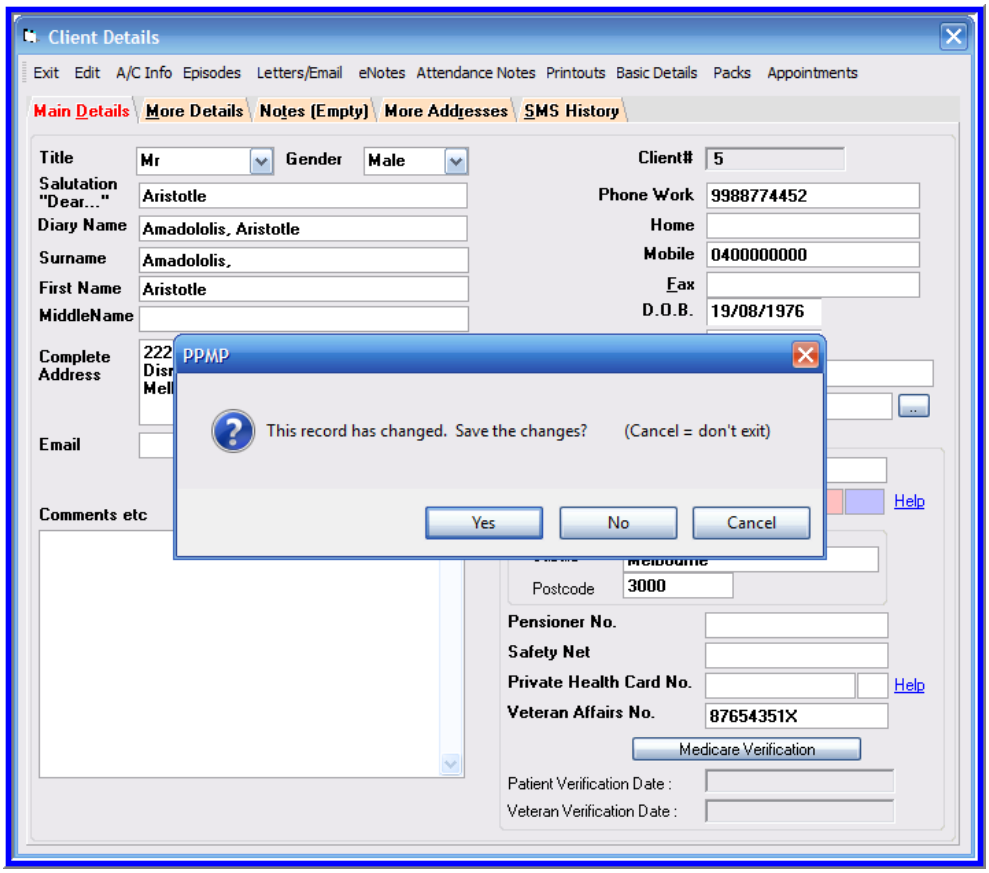
If there are differences between the data you submit and what Medicare have on file you will get the below screen


Medicare Online Verification Selection
Select Option
Patient Verification Results
Veteran Verification Results
Report Status Information
Report Status Code [0] - The task has been completed successfully.
TransactionId - NJL000006703513fbb8c7c01
Medicare Status Information
Medicare Status Code [8005] - The individual has been matched using the submitted data however differences were identified. Please check the information returned and update your records.
Medicare System Patient Details
First Name :
NED
Surname :
LISA
Veteran Card Type :
PTEC - Gold Card
Update Patient Details
Exit

- Click Update Patient Details

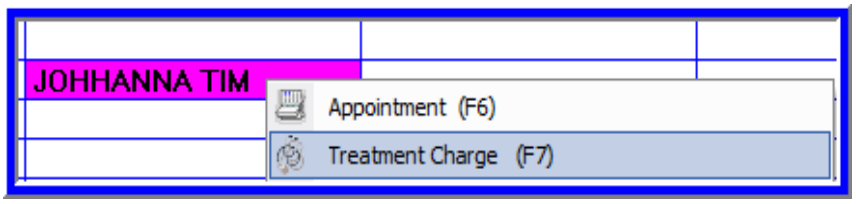


- Click Yes

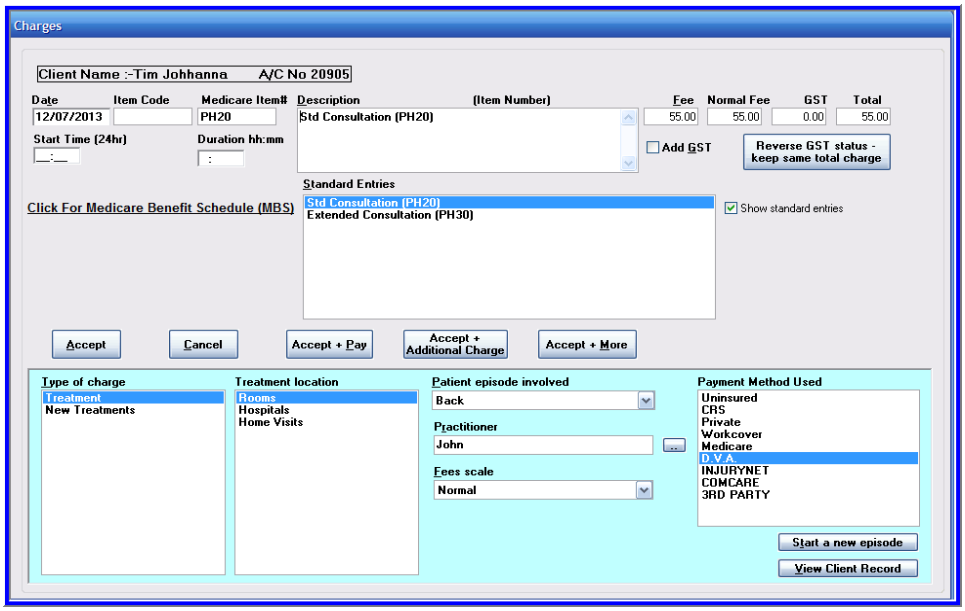


- Close Client Details screen and save changes

1.3 Treatment charging, recording and transmitting the voucher

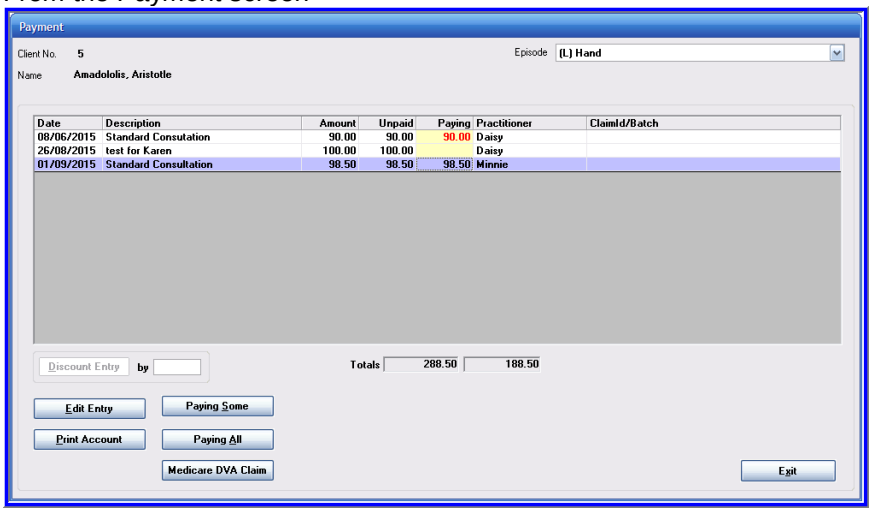


- Right click on Client Name on Diary
- Select Treatment Charge



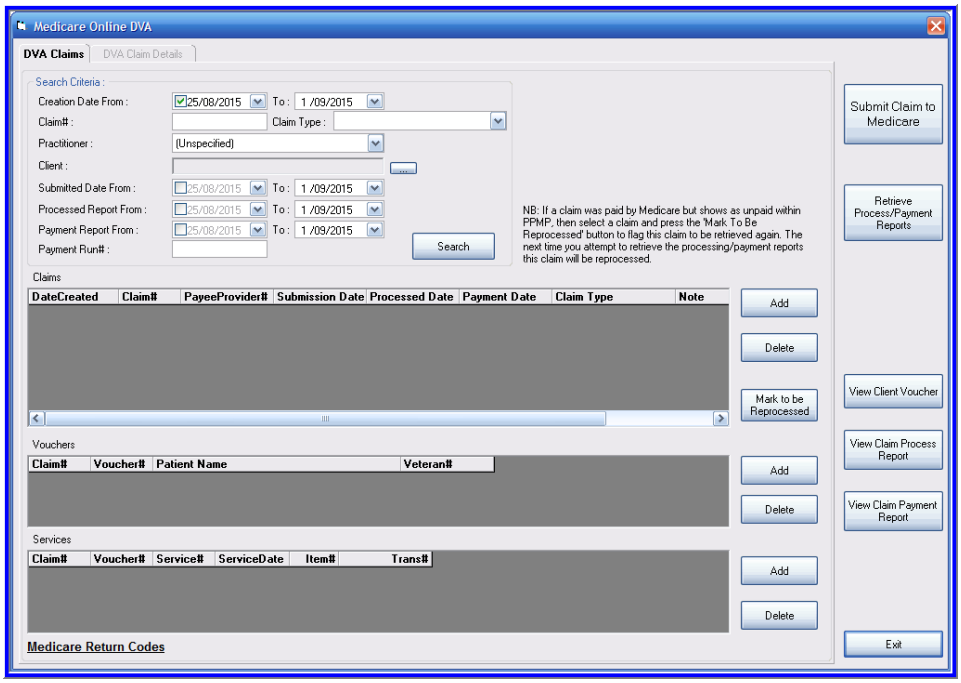
- Make sure there is an Item Number under Medicare Item #
- Treatment Charge as normal
- Click Accept and Pay

From the Payment screen



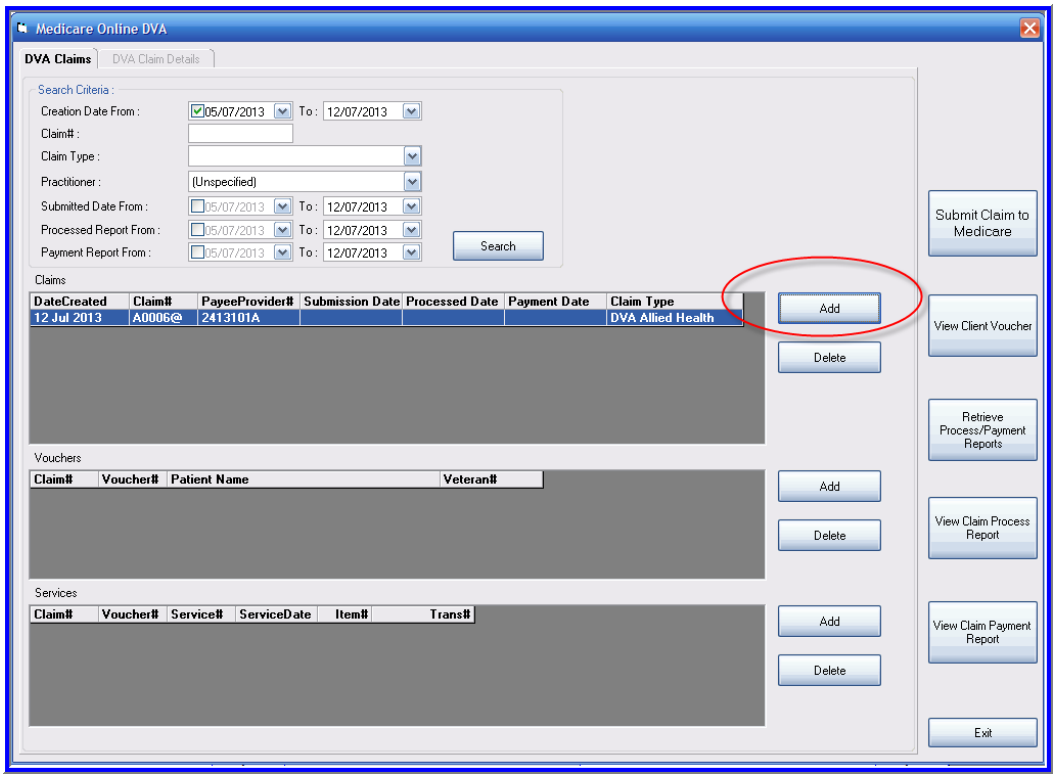
- Double Click in the Paying field

- Click on Medicare DVA Claim

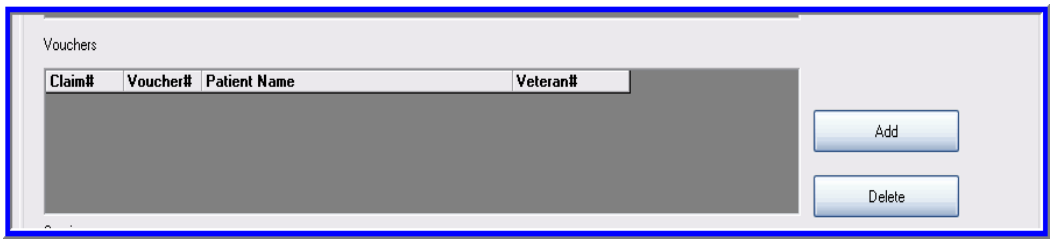

Medicare Online DVA
DVA Claims
DVA Claim Details
Search Criteria :
Creation Date From : 25/08/2015 To : 1 /09/2015
Claim# :
Claim Type :
Practitioner : (Unspecified)
Client :
Submitted Date From : 25/08/2015 To : 1 /09/2015
Processed Report From : 25/08/2015 To : 1 /09/2015
Payment Report From : 25/08/2015 To : 1 /09/2015
Payment Run# :
Search
NB: If a claim was paid by Medicare but shows as unpaid within PPMP, then select a claim and press the 'Mark To Be Reprocessed' button to flag this claim to be retrieved again. The next time you attempt to retrieve the processing/payment reports this claim will be reprocessed.
Submit Claim to Medicare
Retrieve Process/Payment Reports
Claims
DateCreated Claim# PayeeProvider# Submission Date Processed Date Payment Date Claim Type Note
Add
Delete
Mark to be Reprocessed
View Client Voucher
View Claim Process Report
Vouchers
Claim# Voucher# Patient Name Veteran#
Add
Delete
View Claim Payment Report
Services
Claim# Voucher# Service# ServiceDate Item# Trans#
Add
Delete
Medicare Return Codes
Exit

The above screen is the Main screen. This screen allows you to:

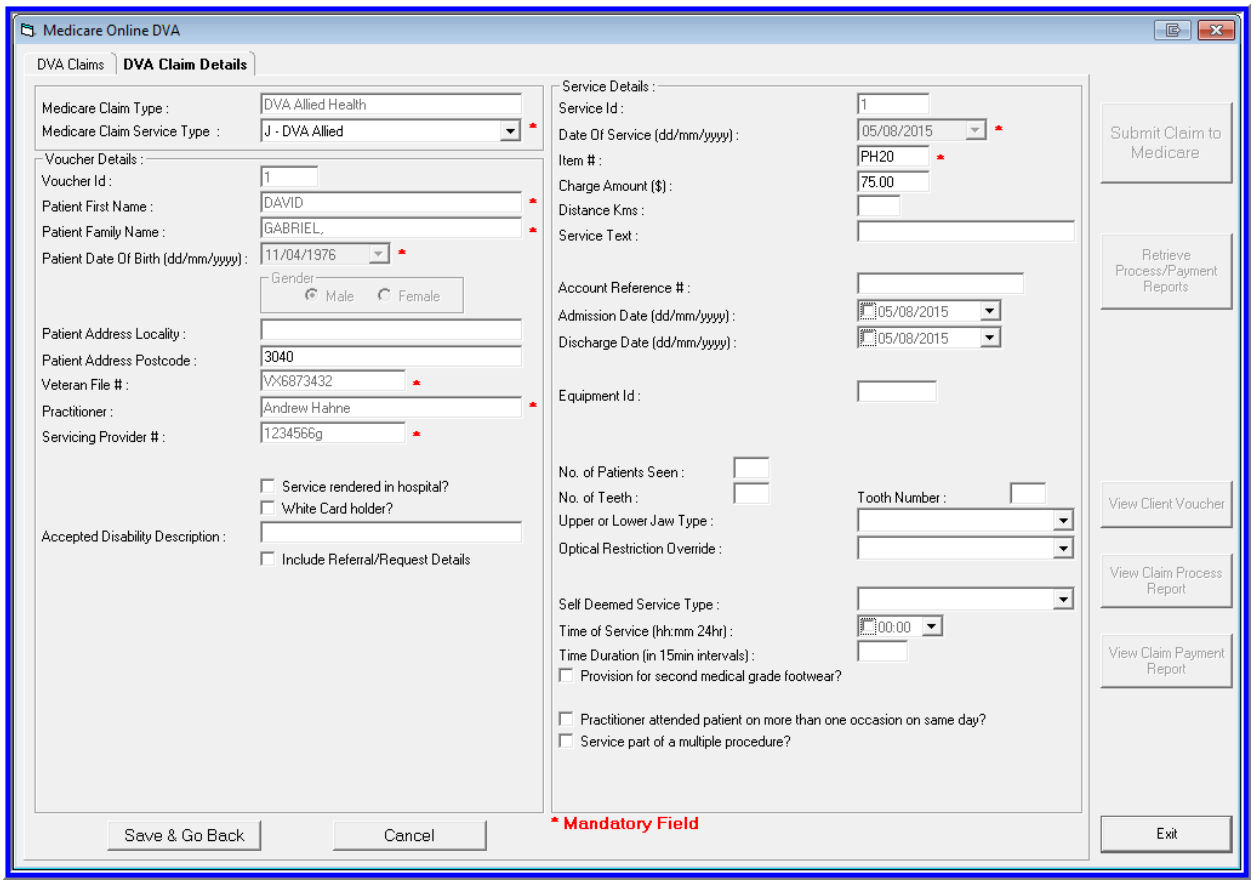
- Search (existing Claims)
- **Create Claims**
- Delete Claims
- View/Print Reports



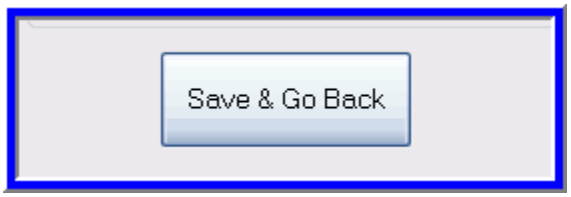
- Under Claims, Click Add
- A New Claim will be added



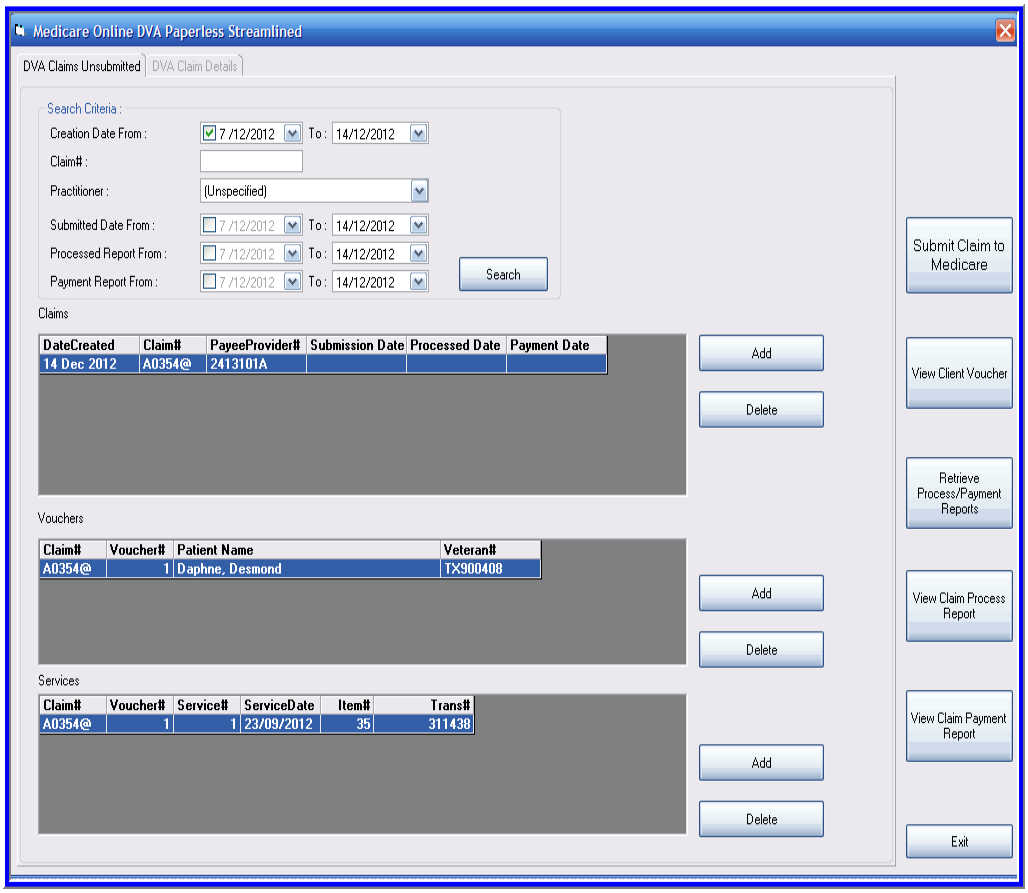
- Under Vouchers, Click Add



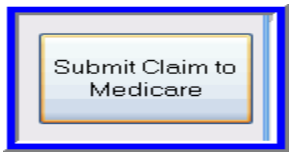
- All sections marked with * MUST be entered



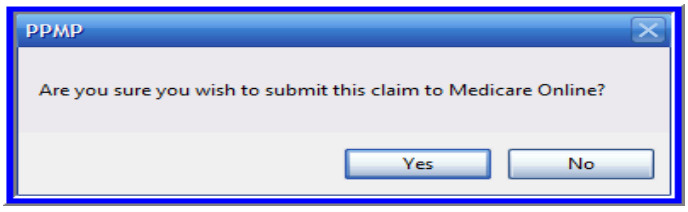
- Click Save & Go Back



- We have recorded 1 Claim (contains 1 service/1 voucher)



- Click Submit to Medicare

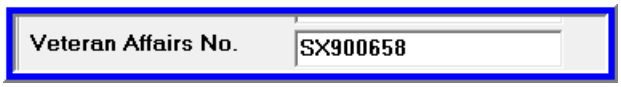


- Click Yes – you will receive notification that it has been sent.

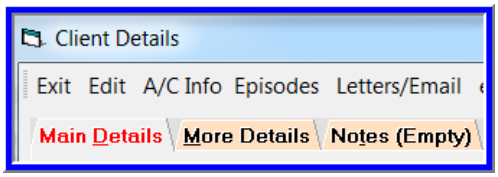
NB: Please note PPMP allows you to create a claim with multiple vouchers and multiple services within each voucher. However we HIGHLY RECOMMEND one voucher per claim for auditing and maintenance purposes.

1.4 Record white card holders

On Client Details Screen

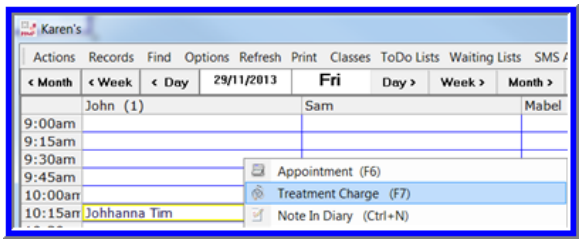


- Insert Veteran Affairs No

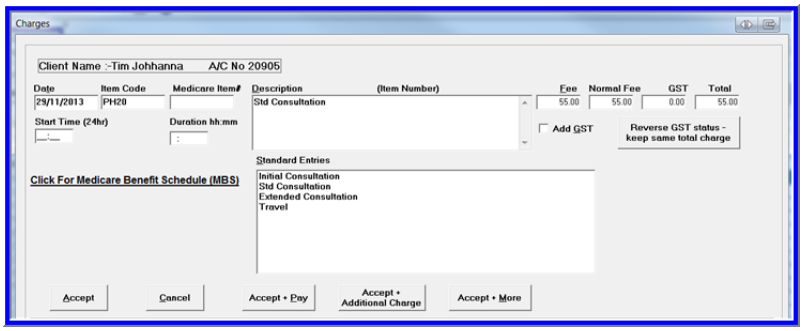


- Click More details

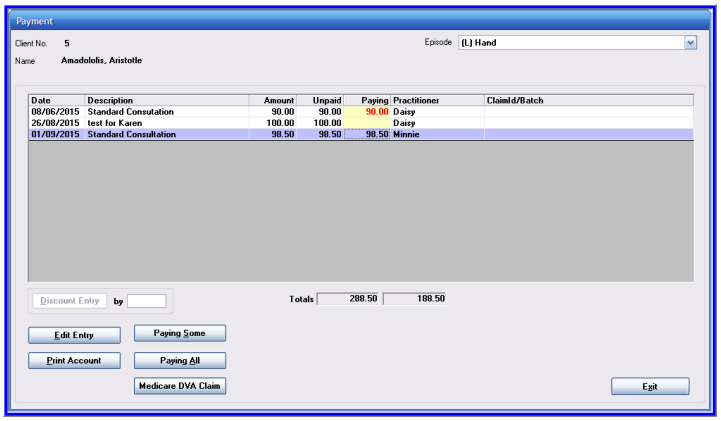
- Tick White Card Holder
- Exit & Save Changes



- Treatment Charge the client

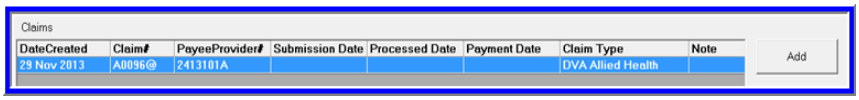


- Click Accept & Pay (or Accept & More if adding Travel)



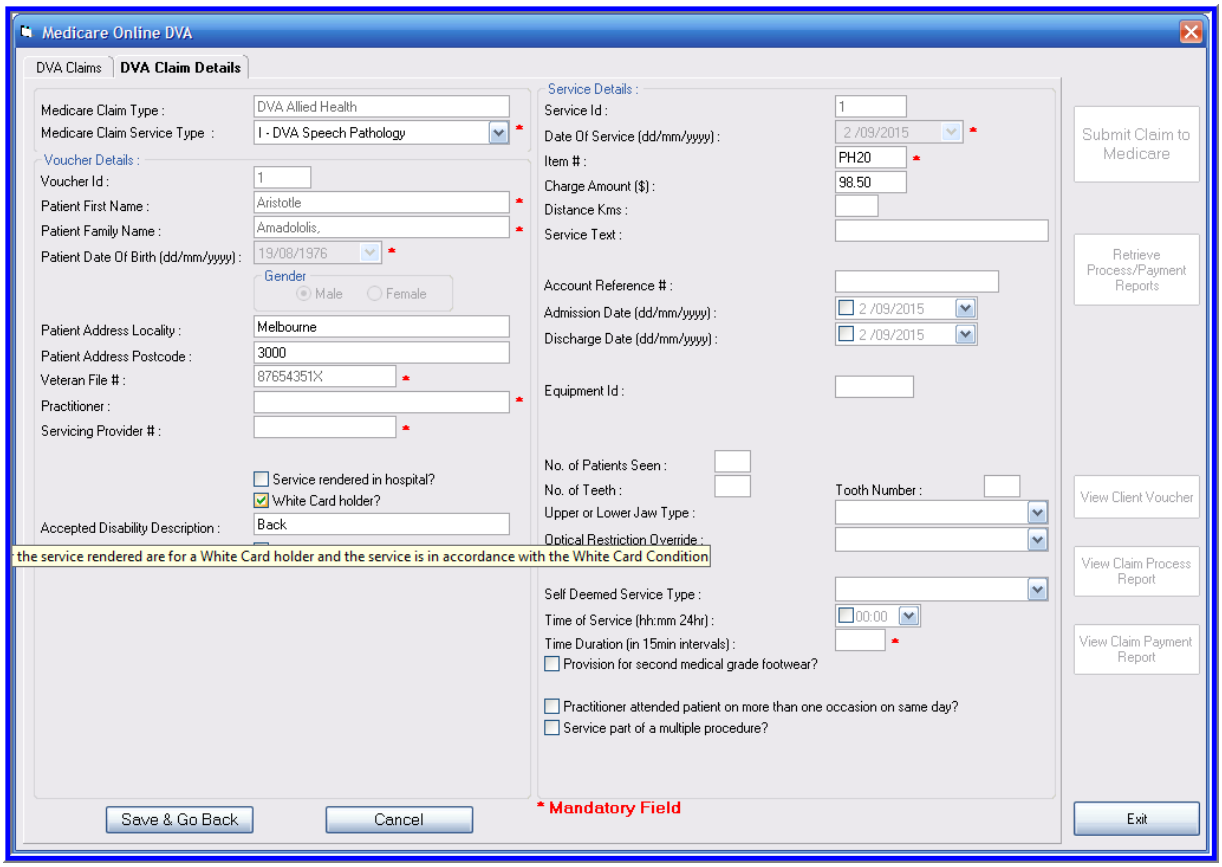
- Double Click in Paying Field

- Click Medicare DVA Claim

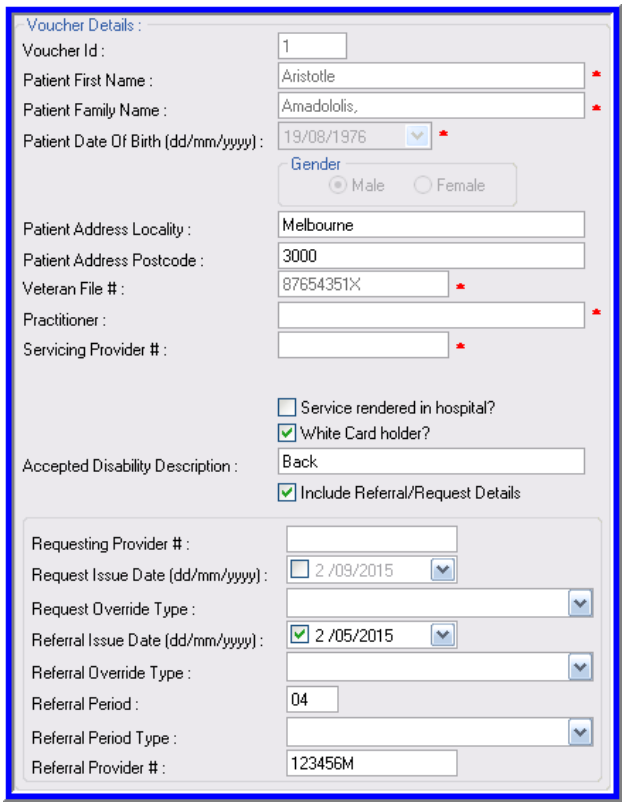


- Under Claims – Click Add

- Under Vouchers – Click Add



- White Card Holder should be ticked
- Accepted Disability Description should be inserted (this information will be taken from Episode screen -> Presenting Problem)
- **Tick** Include Referral/Request Details

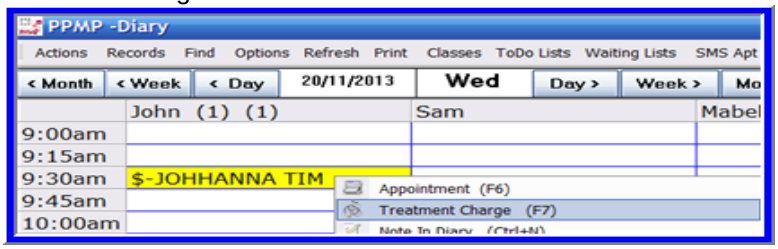

Voucher Details :
Voucher Id : 1
Patient First Name : Aristotle
Patient Family Name : Amadololis,
Patient Date Of Birth (dd/mm/yyyy) : 19/08/1976
Gender
Male
Female
Patient Address Locality : Melbourne
Patient Address Postcode : 3000
Veteran File # : 87654351X
Practitioner :
Servicing Provider # :
Service rendered in hospital?
White Card holder?
Accepted Disability Description : Back
Include Referral/Request Details
Requesting Provider # :
Request Issue Date (dd/mm/yyyy) : 2 /09/2015
Request Override Type :
Referral Issue Date (dd/mm/yyyy) : 2 /05/2015
Referral Override Type :
Referral Period : 04
Referral Period Type :
Referral Provider # : 123456M

- **Tick** Referral Issue Date
- Referral Period should be inserted (this information will be taken from Episode screen)
- Referral Period should be inserted (this information will be taken from Episode screen)
- Referral Provider Number should be inserted (this information will be taken from Episode screen)
- Make sure ALL * Fields are filled in
- Click Save & Go Back

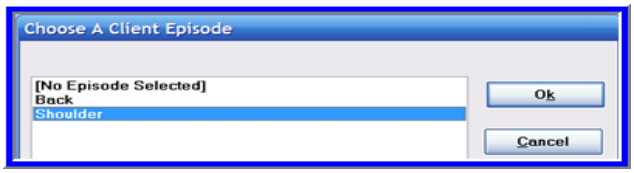
- Click Submit to Medicare

1.5 How to record travel - Km's

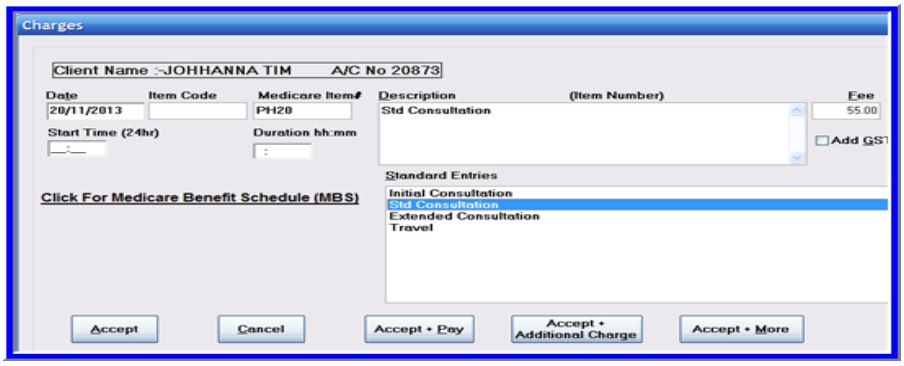
NB: DVA do not pay the first 10km's.
When recording Travel ADD it to the same Claim & Voucher as the Treatment



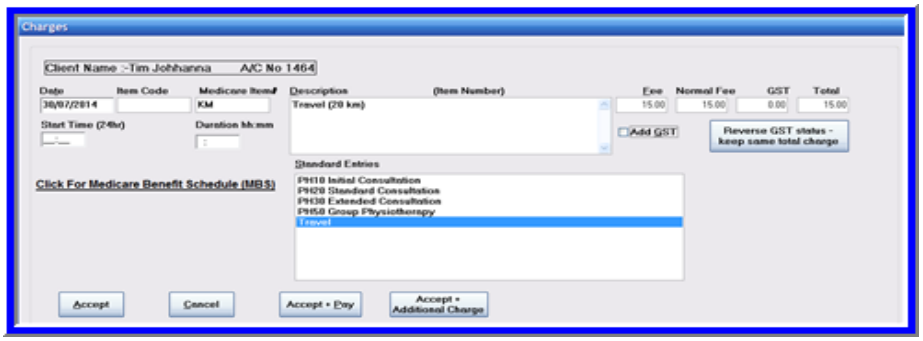
- Right Click
- Treatment Charge



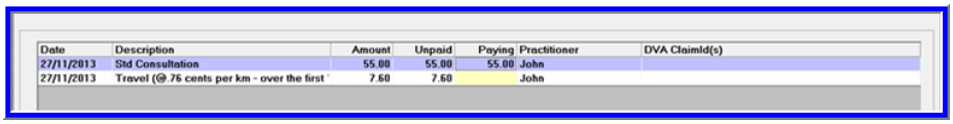
- Select Episode (if requested)



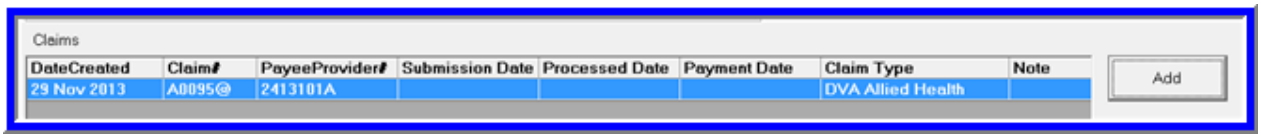
- Click Accept & More
  (Or **Accept & Additional Charge** if Travel charges are on your Item No Fee Lists)



- Charge for Travel – making sure you have **KM** in the Item Code

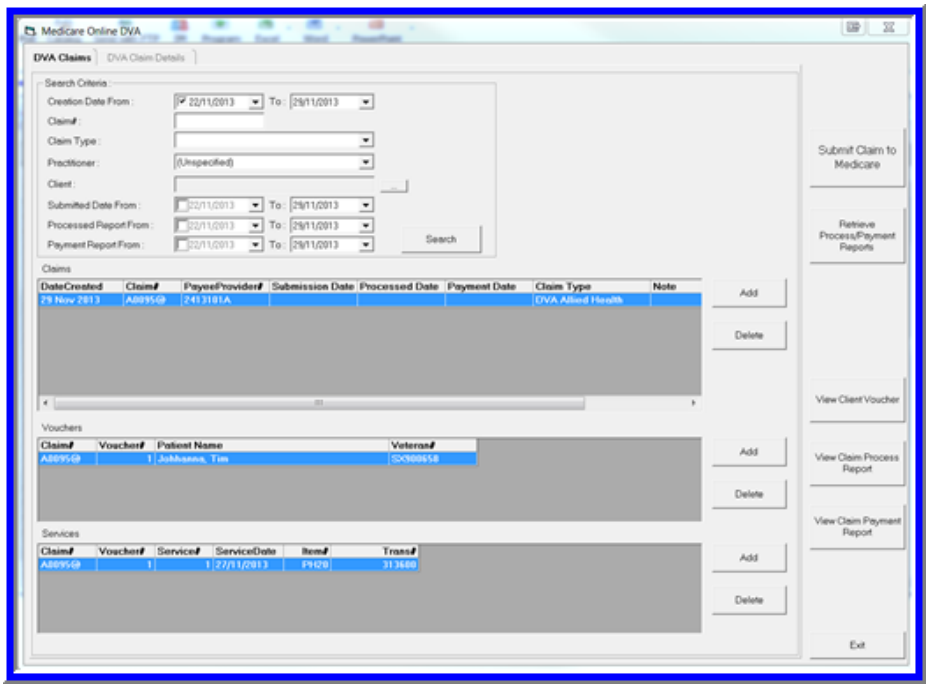


- Double Click in the Paying Column to record the payment for the Treatment
- Click Medicare DVA Claim

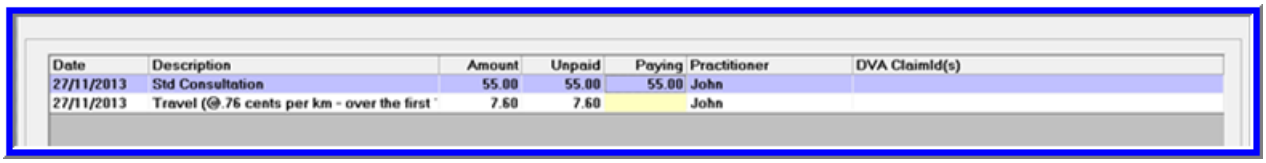


- Click Add (to add the claim)

- Click Add (to add the voucher)
- Make sure all * fields are filled in (don't forget to delete Referral Period & Referral Provider #)
- Click Save & Go Back



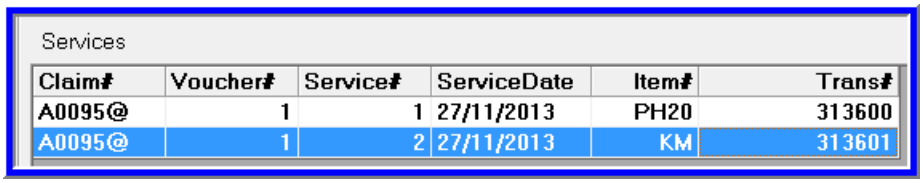
- **DO NOT** SUBMIT TO MEDICARE
- Click Exit



- Back on the Payment screen
- Double Click in the Paying Field next to travel charge
- Click Medicare DVA Claim

- Select the same Claim/Voucher
- Under the Services Claim - Click Add

- Make sure Item # has KM
- Remove the Charge Amount
- Insert TOTAL Distance Kms (DVA will pay less 10 km's)
- Click Save & Go Back

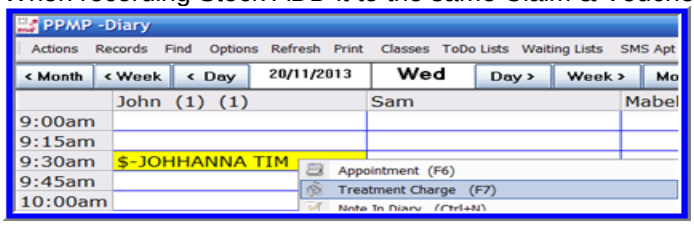


- Note the service (2 = Km) has been added to the same voucher / claim as the original service fee

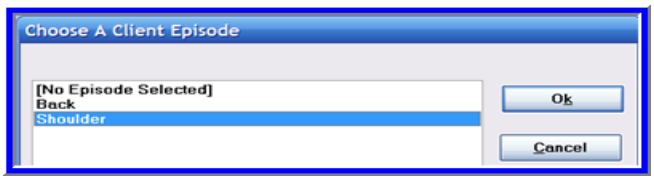
- Click Submit to Medicare

1.6 How to record stock

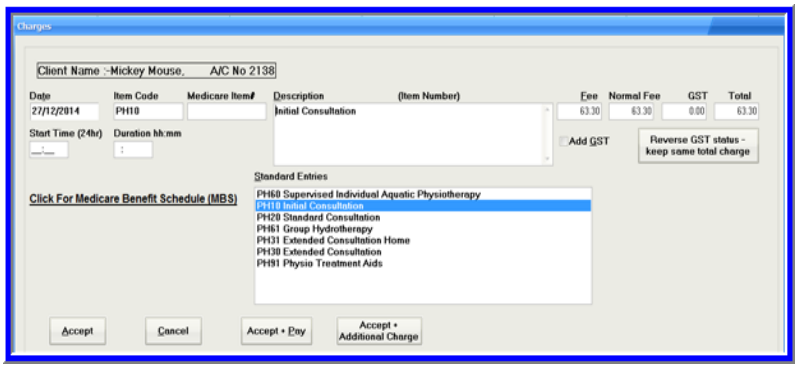
NB: DVA ADD GST TO THE STOCK ITEM AT THE TIME OF PAYMENT
When recording Stock ADD it to the same Claim & Voucher as the Treatment



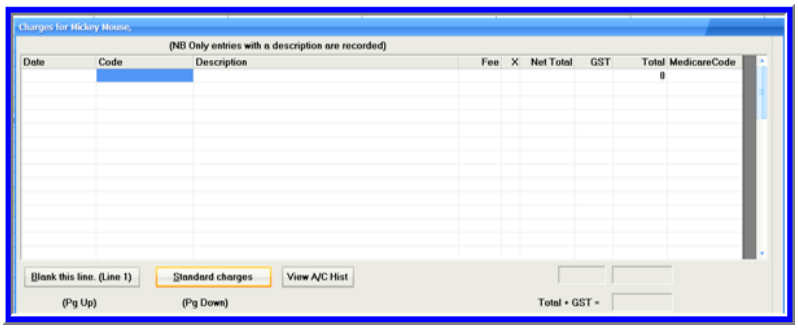
- Right Click
- Treatment Charge



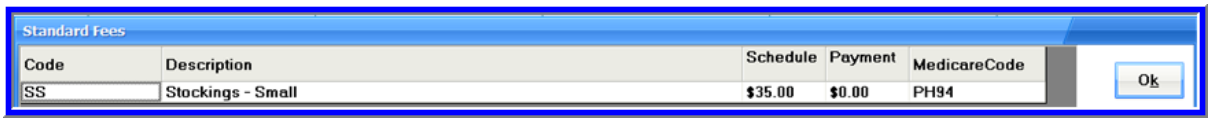
- Select Episode (if requested)


Charges
Client Name :-Mickey Mouse, A/C No 2138
Date Item Code Medicare Item# Description (Item Number) Fee Normal Fee GST Total
27/12/2014 PH10 Initial Consultation 63.30 63.30 0.00 63.30
Start Time (24hr) Duration hh:mm
Add GST
Reverse GST status - keep same total charge
Standard Entries
Click For Medicare Benefit Schedule (MBS)
PH60 Supervised Individual Aquatic Physiotherapy
PH10 Initial Consultation
PH20 Standard Consultation
PH61 Group Hydrotherapy
PH31 Extended Consultation Home
PH30 Extended Consultation
PH91 Physio Treatment Aids
Accept
Cancel
Accept + Pay
Accept + Additional Charge

- Click Accept & Additional Charge

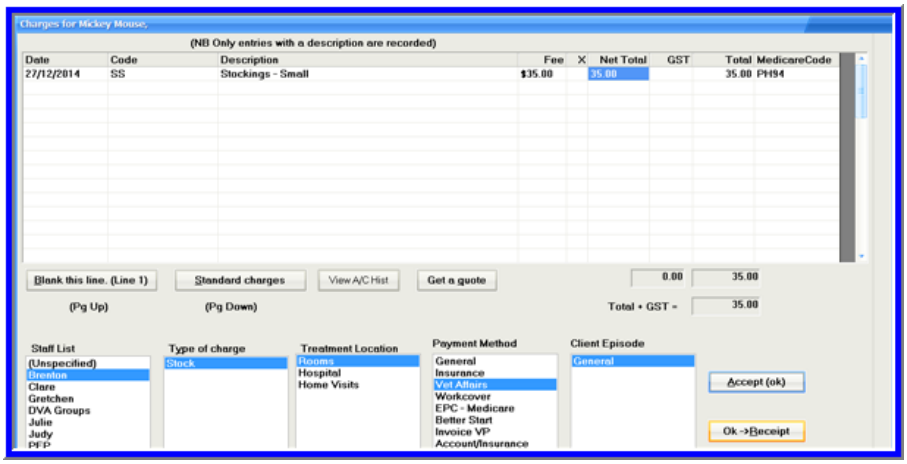

Charges for Mickey Mouse,
(NB Only entries with a description are recorded)
Date Code Description Fee X Net Total GST Total MedicareCode
Blank this line. (Line 1)
Standard charges
View A/C Hist
(Pg Up)
(Pg Down)
Total + GST =

- Click Standard Charges



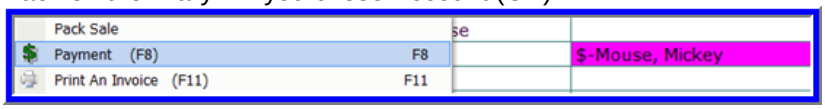
- Select Item from list
- Click OK

NB: DO NOT ADD GST TO THE CHARGE AT THIS STAGE
(if GST is required you need to add it AFTER you have submitted to Medicare as they add GST to your total billed)

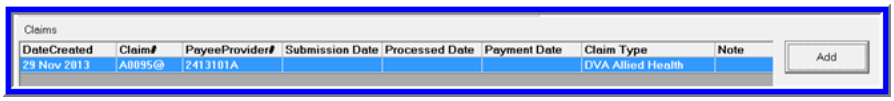


- Click Accept (OK)
- OR OK (receipt) to go straight to payment screen

Back on the Diary – if you chose Account (OK)

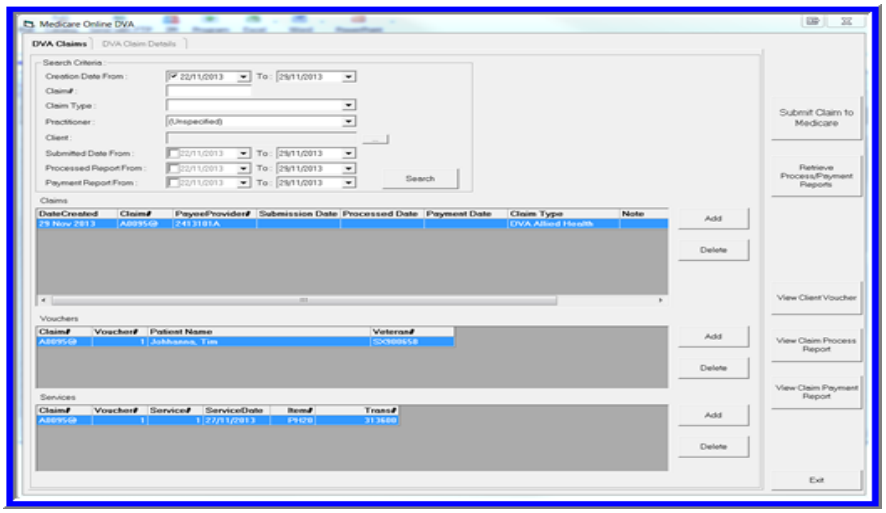


- Go to Actions
- Payment

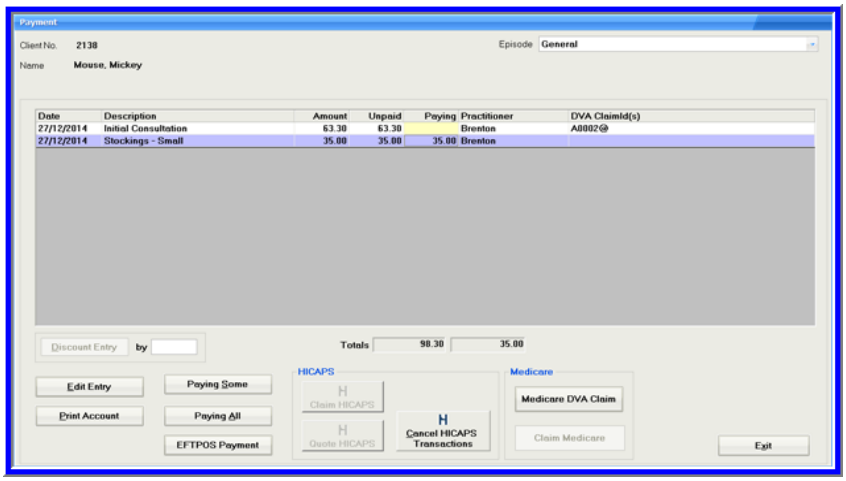


- Click Add (to add the claim)

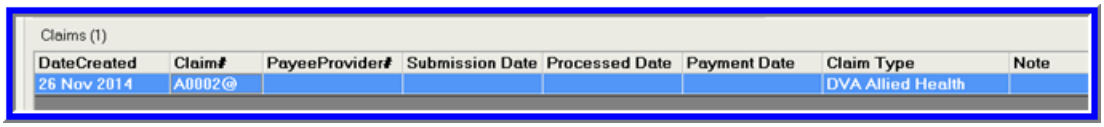
- Click Add (to add the voucher)
- Make sure all * fields are filled in (don't forget to delete Referral Period & Referral Provider number – unless they are White Card Holder)
- Click Save & Go Back



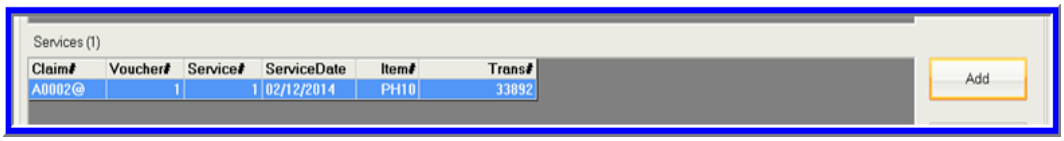
- **DO NOT** SUBMIT TO MEDICARE
- Click Exit



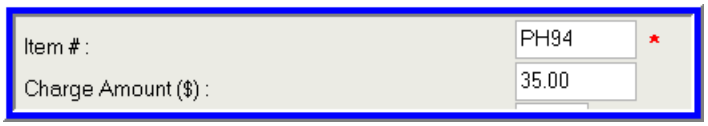
- Back on the Payment screen
- Double Click in the Paying Field next to Additional Charge
- Click Medicare DVA Claim



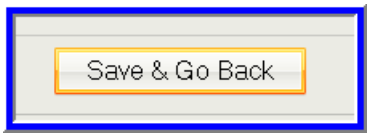
- Select the **same** Claim/Voucher (under Claims – top section you may need to scroll to the bottom to find the claim)



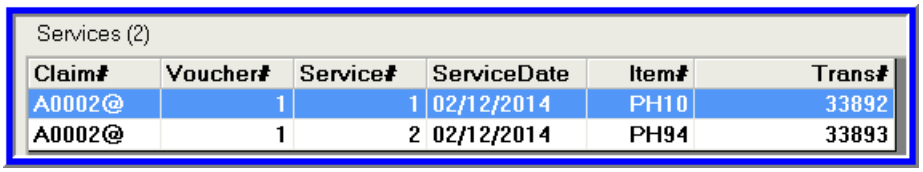
- Under the Services Claim - Click Add (third add button)



- Make sure Item number is present

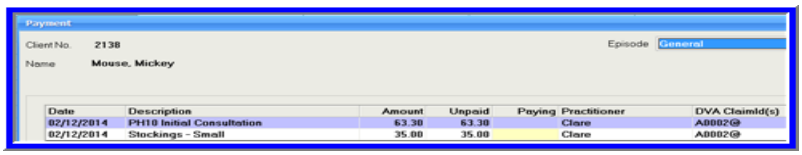


- Click Save & Go Back



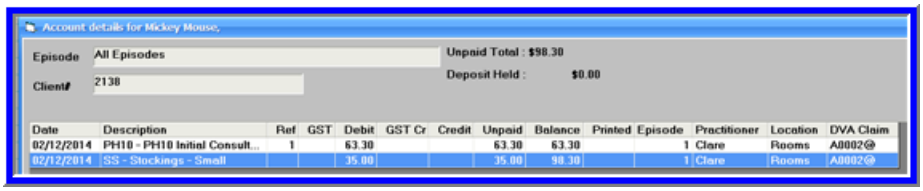
- Note the 2 services have been added to the same voucher

- Click Submit to Medicare

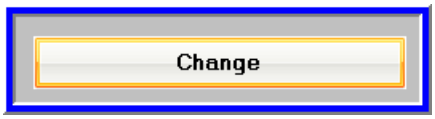

Payment
Client No. 2138
Episode General
Name Mouse, Mickey
Date Description Amount Unpaid Paying Practitioner DVA ClaimId(s)
02/12/2014 PH10 Initial Consultation 63.30 63.30 Clare A0002@
02/12/2014 Stockings - Small 35.00 35.00 Clare A0002@

- Back on the Payment screen you will see that the service has been added to the same DVA Claim
- Exit and return back to the Client's Account information screen (if you need to Add GST)

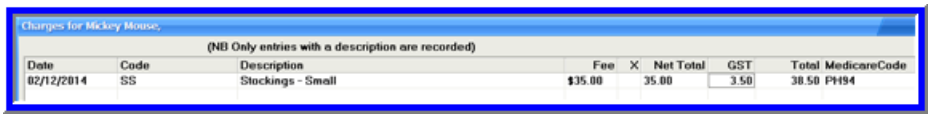
Back in the Client Account Information Screen


Account details for Mickey Mouse,
Episode All Episodes
Client# 2138
Unpaid Total : $98.30
Deposit Held : $0.00
Date Description Ref GST Debit GST Cr Credit Unpaid Balance Printed Episode Practitioner Location DVA Claim
02/12/2014 PH10 - PH10 Initial Consult... 1 63.30 63.30 63.30 1 Clare Rooms A0002@
02/12/2014 SS - Stockings - Small 35.00 35.00 98.30 1 Clare Rooms A0002@

- Select the item that requires GST
- Select Ctrl G (on your keyboard)



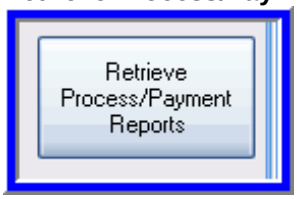
- This will bring up the "Change" button
- Click Change


Charges for Mickey Mouse,
(NB Only entries with a description are recorded)
Date Code Description Fee X Net Total GST Total MedicareCode
02/12/2014 SS Stockings - Small $35.00 35.00 3.50 38.50 PH94

- Click in the "GST" column (this will add GST to your total)
- This should now be the amount that you will receive from Medicare

1.7 DVA Reports

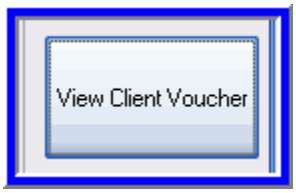
Retrieve Process/Payment Reports



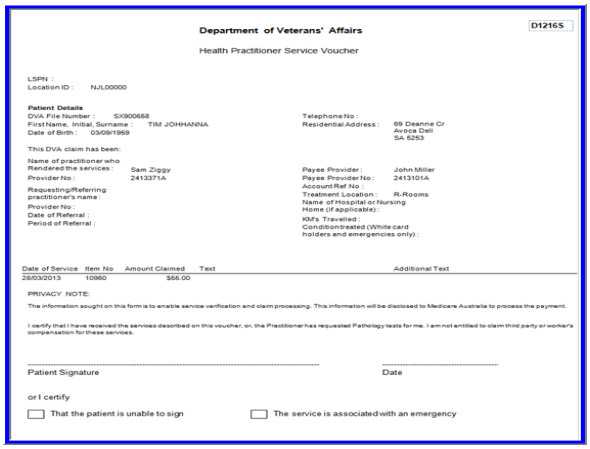
- Click Retrieve Process/Payment Reports

NB: Select this once/twice a day to check if Medicare has processed the claim(s), (usually a 48 hour turn around by Medicare). If a claim has been processed and/or paid, then PPMP will display the relevant date on the main screen beside the applicable claim.

View & Print Client Vouchers (Patient Copy)



- Click View Client Voucher



Department of Veterans' Affairs D1216S

Health Practitioner Service Voucher

LSPN :
Location ID : NJL00000

Patient Details
DVA File Number : SX900668
First Name, Initial, Surname : TIM JOHHANNA
Date of Birth : 03/09/1969

Telephone No :
Residential Address : 69 Deanne Cr
Avoca Dell
SA 5253

This DVA claim has been:

Name of practitioner who
Rendered the services : Sam Ziggy
Provider No : 2413371A

Requesting/Referring
practitioner's name :
Provider No :
Date of Referral :
Period of Referral :

Payee Provider : John Miller
Payee Provider No : 2413101A
Account Ref No :
Treatment Location : R-Rooms
Name of Hospital or Nursing
Home (if applicable) :
KMs Travelled :
Conditiontreated (White card
holders and emergencies only) :

Date of Service	Item No	Amount Claimed	Text	Additional Text
28/03/2013	10960	$66.00		

PRIVACY NOTE:

The information sought on this form is to enable service verification and claim processing. This information will be disclosed to Medicare Australia to process the payment.

I certify that I have received the services described on this voucher, or, the Practitioner has requested Pathology tests for me. I am not entitled to claim third party or worker's compensation for these services.

Patient Signature Date

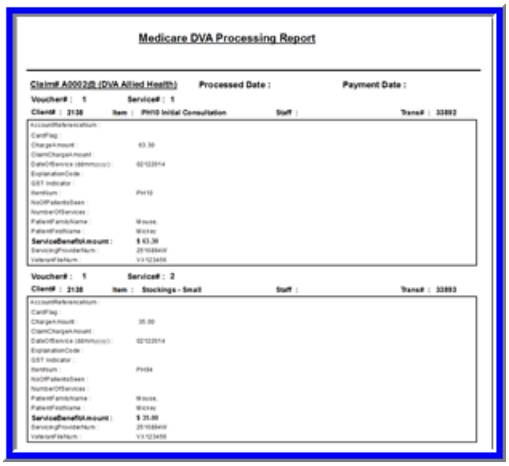
or I certify

☐ That the patient is unable to sign ☐ The service is associated with an emergency

- Print this and give a copy to the Patient (if requested)

View Claim Process Report

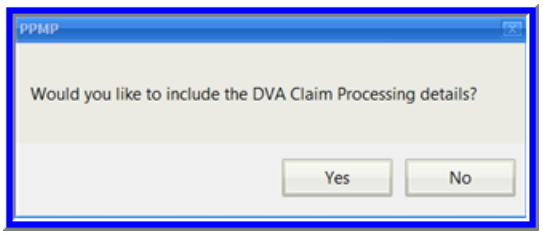
- Click Claim Process Report



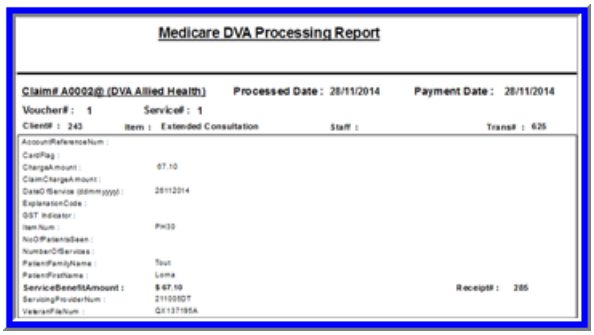
- The report displays details of the selected Claim that have been submitted to Medicare

View Payment Report

- Click on View Claim Payment Report



- Selecting Yes will give you detailed report
- No will give a summary

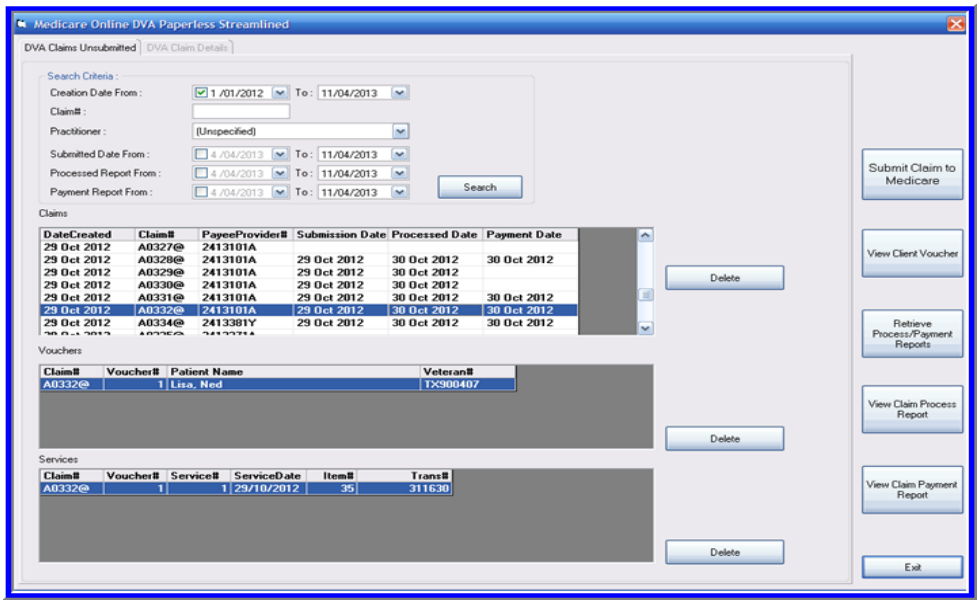

Medicare DVA Processing Report
Claim# A0002@ (DVA Allied Health) Processed Date : 28/11/2014 Payment Date : 28/11/2014
Voucher# : 1 Service# : 1
Client# : 243 Item : Extended Consultation Staff : Trans# : 625
AccountReferenceNum :
CardFlag :
ChargeAmount : 67.10
ClaimChargeAmount :
DateOfService (ddmmyyyy) : 28112014
ExplanationCode :
GST Indicator :
ItemNum : PH30
NoOfPatientsSeen :
NumberOfServices :
PatientFamilyName : Tout
PatientFirstName : Lorna
ServiceBenefitAmount : $ 67.10 Receipt# : 205
ServicingProviderNum : 2110050T
VeteranFileNum : QX137195A

- Report displays Claims that have been paid
- Exit

To View / Transmit Claims

On the Main Screen of PPMP

- Go to Accounts
- Transmit Medicare DVA Claims



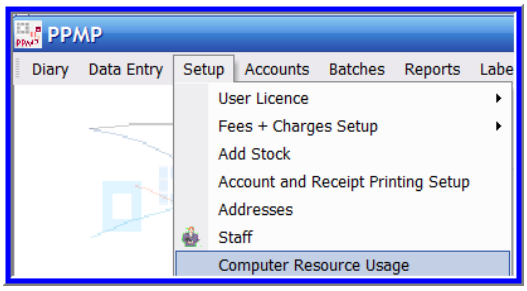
- Insert Date Range
- Click Search
- The display will show all Claims that have been Submitted, Processed and Paid within the selected search parameters.

2 HICAPS

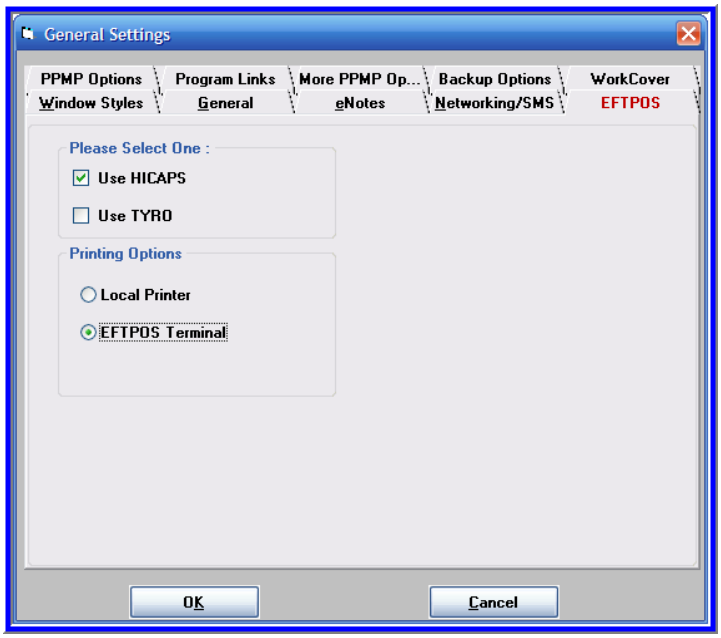
2.1 HICAPS installation & activation

Click HERE to watch video

NB: If you are using the HICAPS Integration you will need to Activate HICAPS first.
From the Main Menu of PPMP®



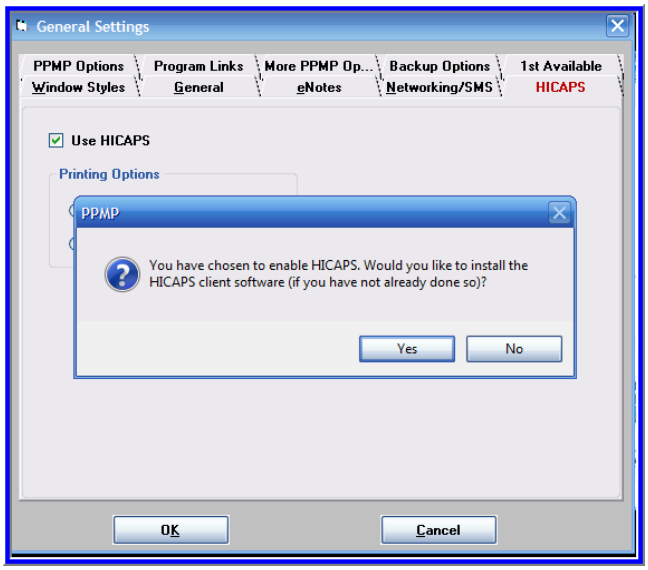
- Click on the Setup Menu
- Click on 'Computer Resource Usage'
- Click on the EFTPOS tab



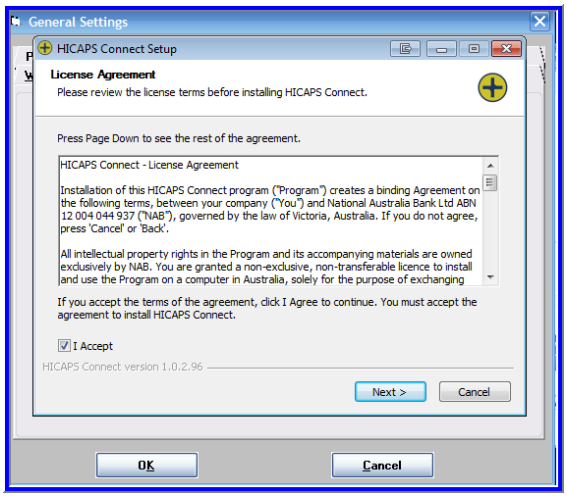
- Click OK
- Tick "Use HICAPS"
- Tick "HICAPS Terminal"
- Click OK

Restart the program for the activation to start.

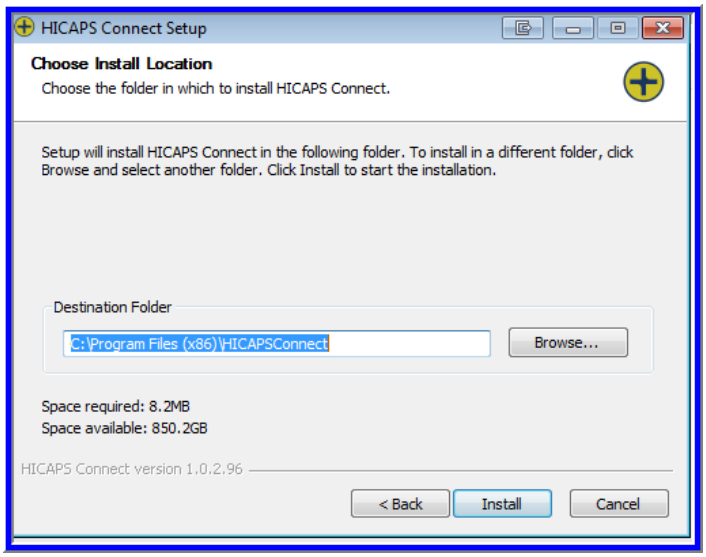
NB: If this is the first time you do not already have the correct HiCaps software installed on your computer you will be prompted to install it. (see below)



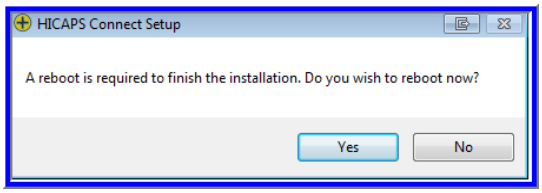
- Click YES to install HIPCAPS software.


General Settings
HICAPS Connect Setup
License Agreement
Please review the license terms before installing HICAPS Connect.
Press Page Down to see the rest of the agreement.
HICAPS Connect - License Agreement
Installation of this HICAPS Connect program ("Program") creates a binding Agreement on the following terms, between your company ("You") and National Australia Bank Ltd ABN 12 004 044 937 ("NAB"), governed by the law of Victoria, Australia. If you do not agree, press 'Cancel' or 'Back'.
All intellectual property rights in the Program and its accompanying materials are owned exclusively by NAB. You are granted a non-exclusive, non-transferable licence to install and use the Program on a computer in Australia, solely for the purpose of exchanging
If you accept the terms of the agreement, click I Agree to continue. You must accept the agreement to install HICAPS Connect.
I Accept
HICAPS Connect version 1.0.2.96
Next >
Cancel
OK
Cancel

- Click the “I Accept box”
- Click Next

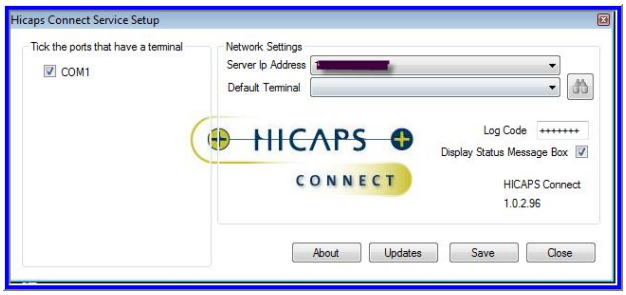

HICAPS Connect Setup
Choose Install Location
Choose the folder in which to install HICAPS Connect.
Setup will install HICAPS Connect in the following folder. To install in a different folder, click Browse and select another folder. Click Install to start the installation.
Destination Folder
C:\Program Files (x86)\HICAPSConnect
Browse...
Space required: 8.2MB
Space available: 850.2GB
HICAPS Connect version 1.0.2.96
< Back
Install
Cancel

- Click Install

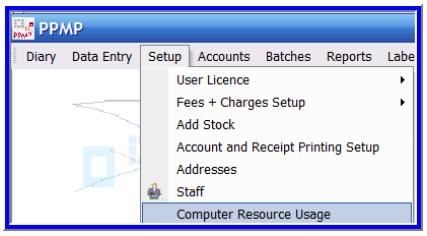


- Click Yes to reboot the computer and allow the installation to finish.
- Once the reboot is complete restart PPMP®.
- A new Hicaps Connect screen will appear leave the default settings and just click save.
- Hicaps will finish the setup and find the terminal. (As long as the terminal is connected to your computer)

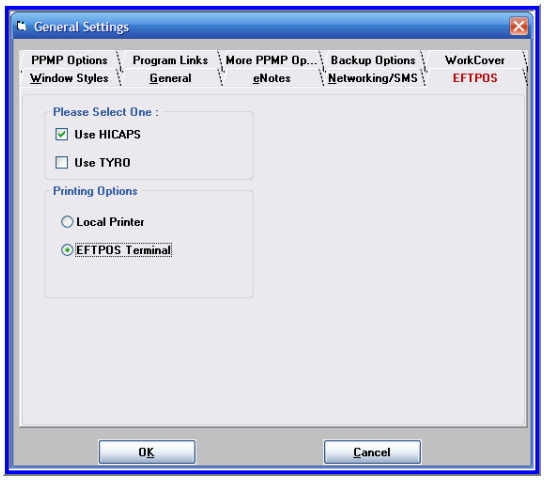
NB: If there is any issue at this stage with your computer and your Hicaps terminal connecting please contact Hicaps and advise them "your **computer** and **terminal** wont connect to each other" before turning Hicaps on in PPMP®



- Click Close after this has finished and restart PPMP® again.
- From the Main Menu of PPMP®



- Click on the Setup Menu
- Click on 'Computer Resource Usage'
- Click on the EFTPOS tab

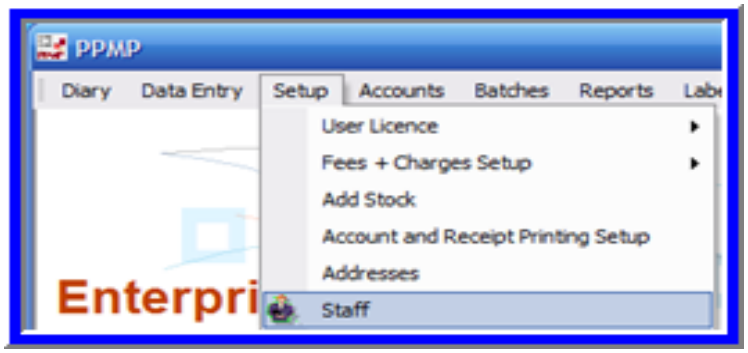


- Tick "Use HICAPS"
- Tick "EFTPOS Terminal"
- Click OK

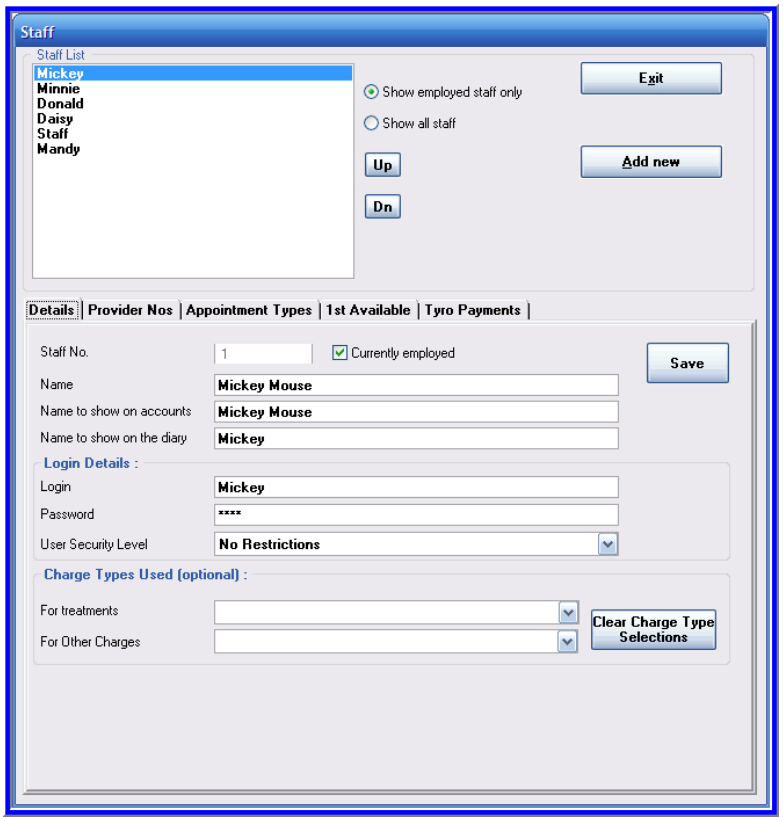
Restart the program for the activation to start.

2.2 HICAPS staff setup

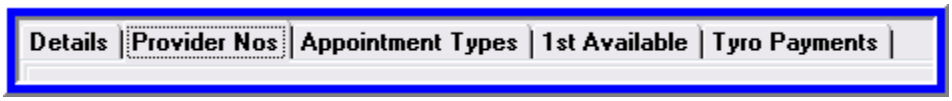
Click HERE to watch video



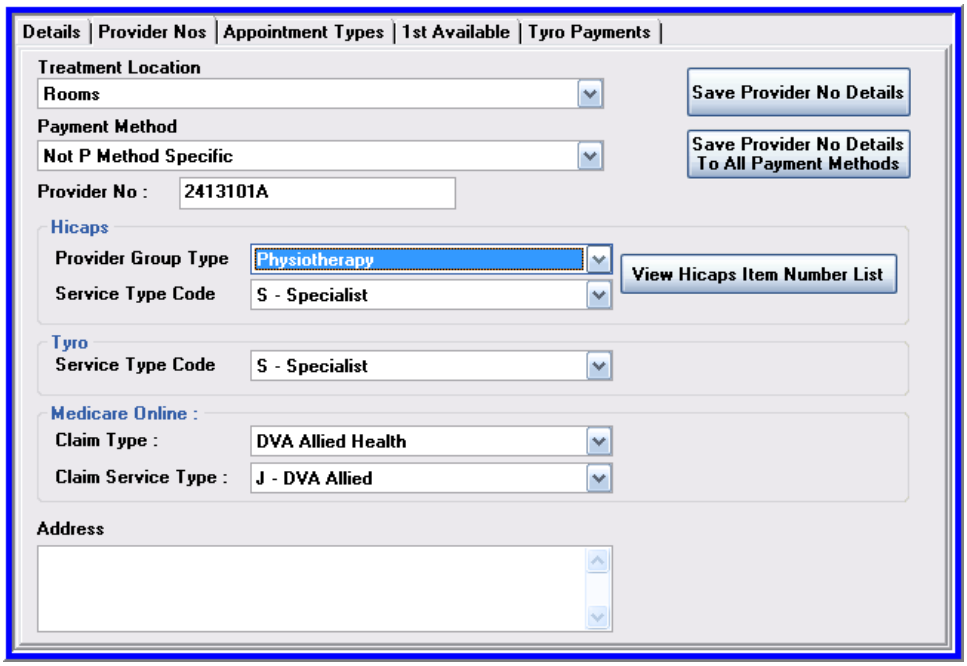
- Go to Setup
- Click Staff



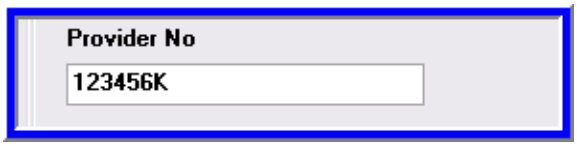
- Select Staff Member



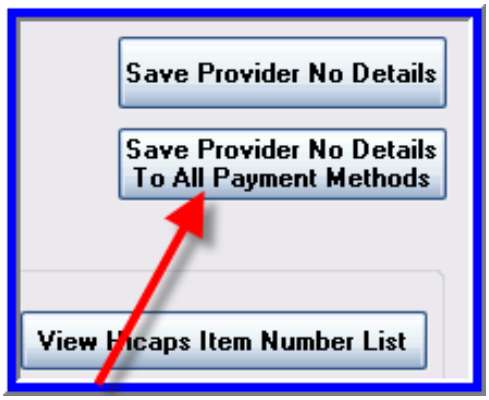
- Select Provider Nos tab



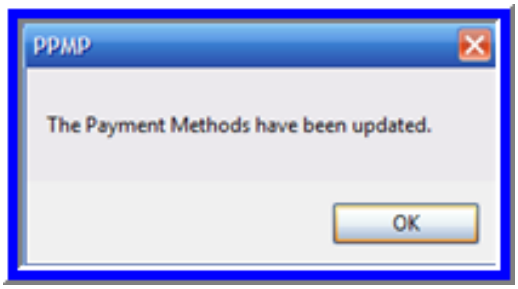
- Select HICAPS Group Item Type



- Insert Provider Number



- Click Save Provider Details to ALL Payment Methods



- Click OK
- Click Save Provider Details

- Click View HICAPS Item Number List for a List of Item Codes

Physiotherapy
Prov Item# Description Abbreviated Desc Fund Item#
500 Initial Consultation And Treatment INIT CONS/TRT T500
505 Standard Treatment STD TREATMENT T505
509 Long Consultation LONG CONS T509

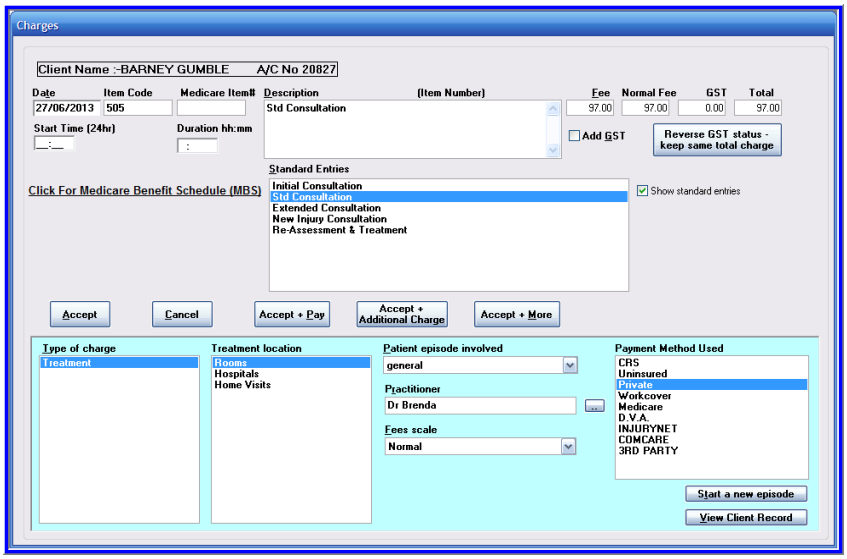
- Exit

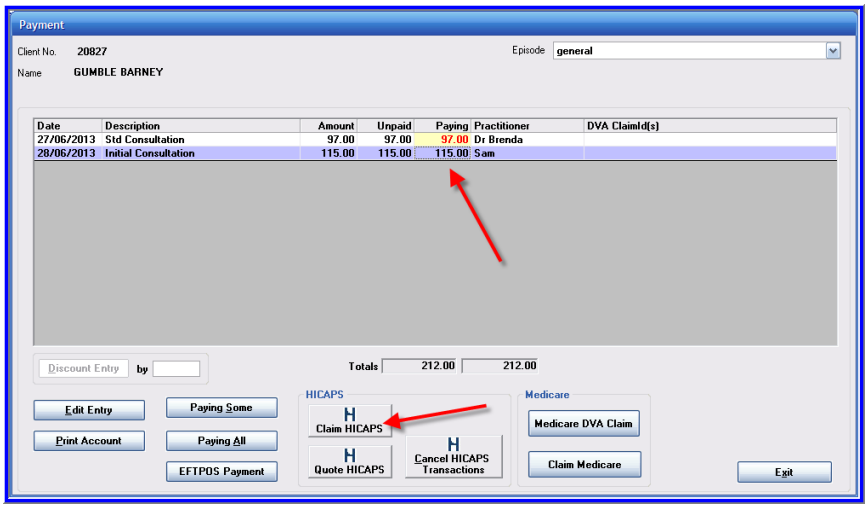
2.3 Using HICAPS Connect with PPMP®

2.4 Processing a claim

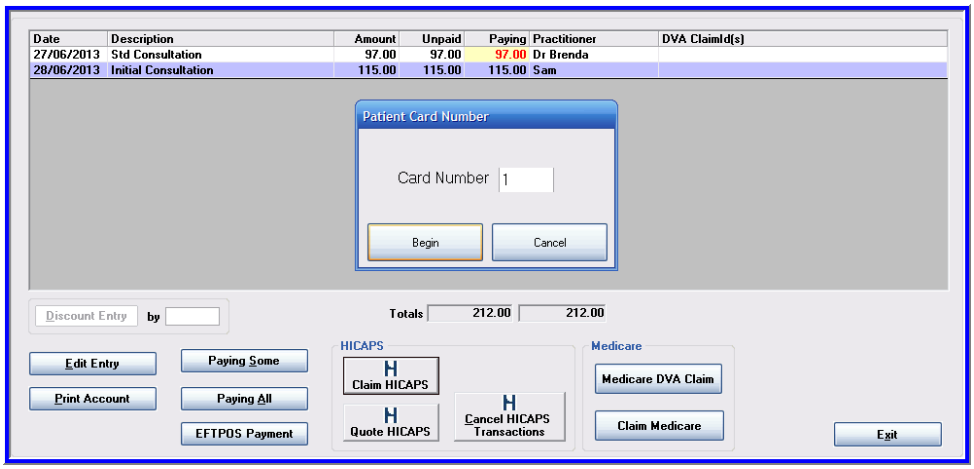
From the PPMP® Diary,

- Treatment Charge & accept payment from the patient.
- (Ensure you have setup item codes for HICAPS in the Fee's & charges Setup)

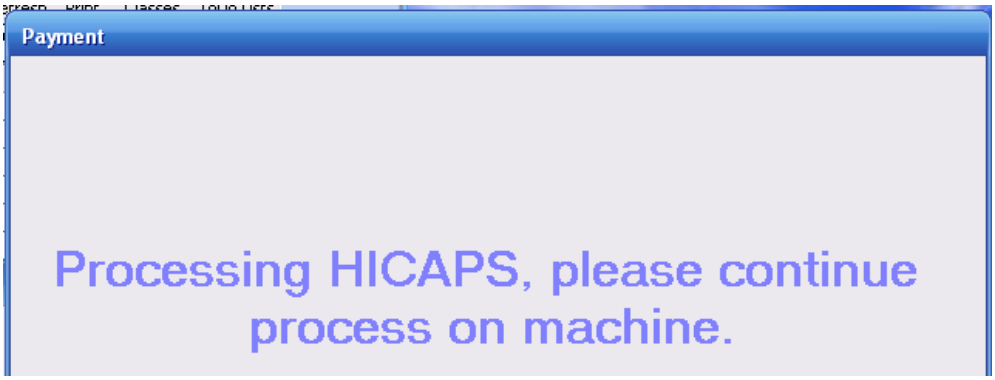




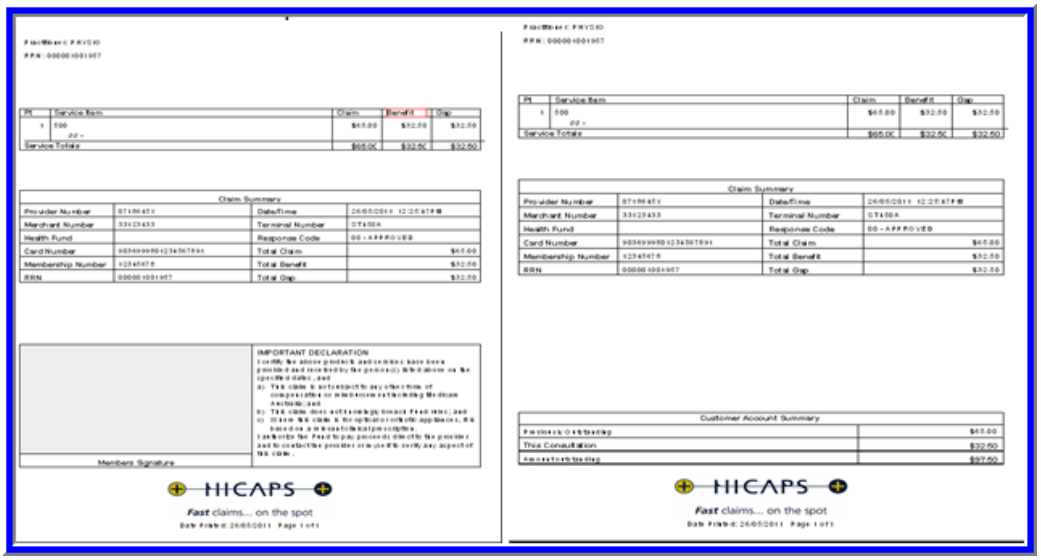
- Double click in the "paying" field to enter the full payment amount, select the Claim HICAPS button.



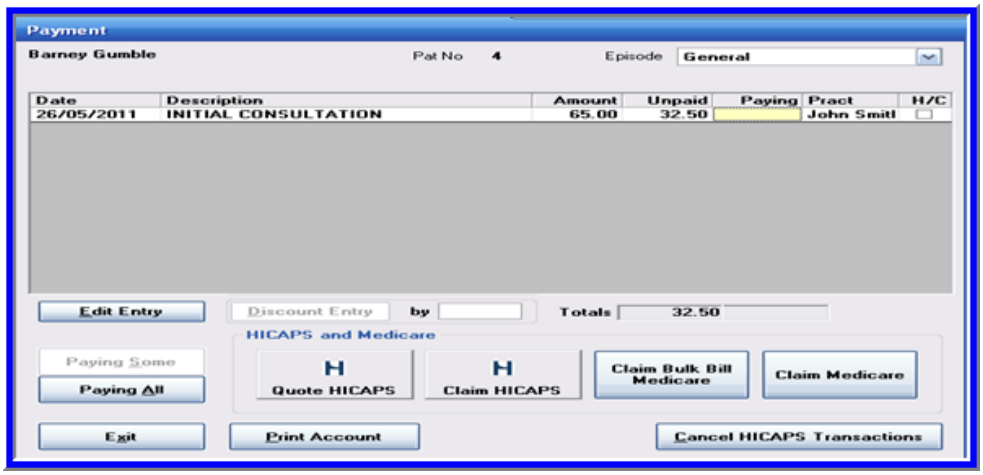
- Enter the number corresponding with the patient name & press begin.
- PPMP® will display the following message



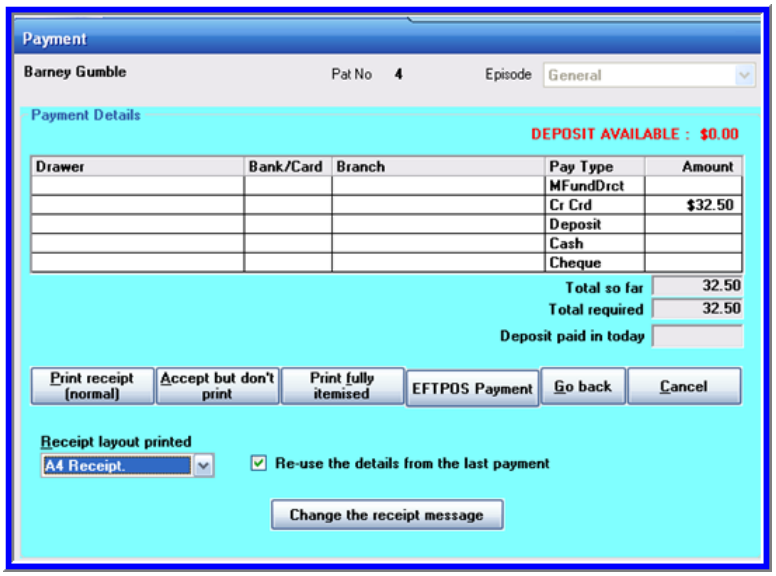
- The HICAPS terminal will prompt you to swipe the patient's card & display your computers name.
- Once the process has completed successfully, PPMP® will display & print the claim summary for you & the Patient. See examples below.



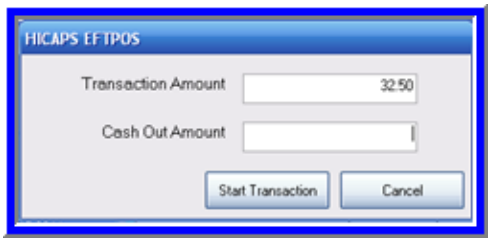
- PPMP® will return you to the payment window, you will notice the Hicaps claim amount has already been deducted from the total amount owing, you can pay the remaining balance or exit.



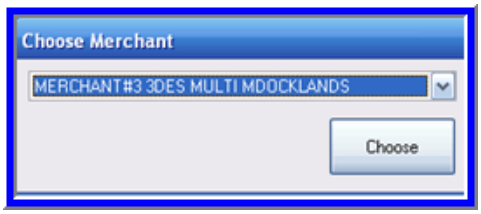
- To pay the remaining balance, select Paying All to continue.



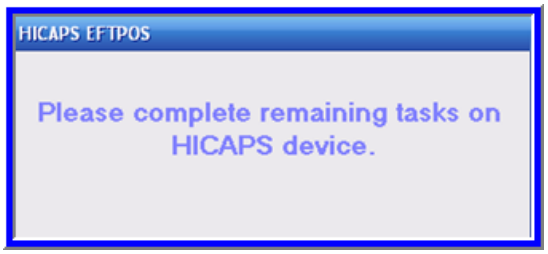
- From the payment window, select the payment type & accept the transaction.
- To pay via EFTPOS Payment, enter the amount & select EFTPOS Payment.



- Enter the amount & press Start Transaction.



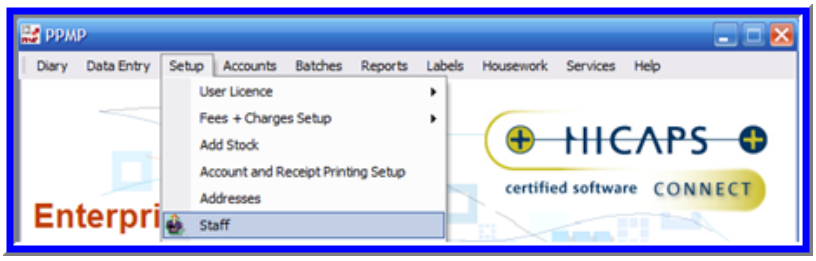
- Select your terminal & press Choose.



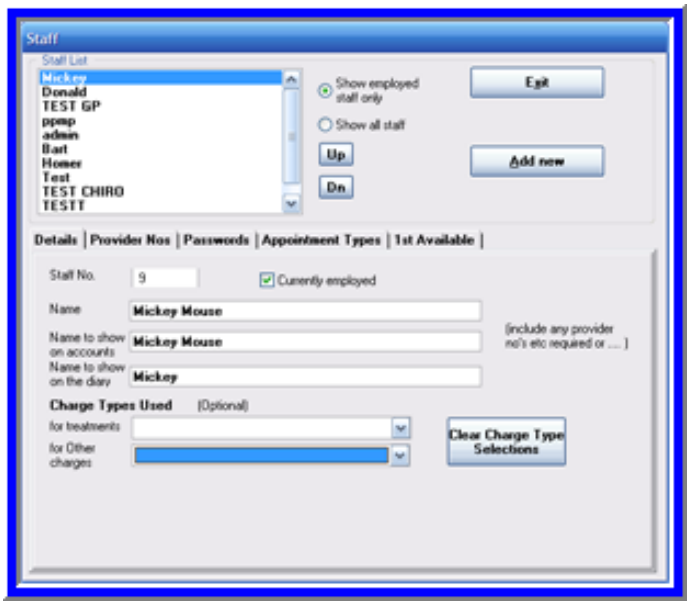
- Complete the transaction on the HICAPS terminal & PPMP® will print a receipt.

2.5 HICAPS - Medicare Easyclaim & staff setup

From the Main Menu

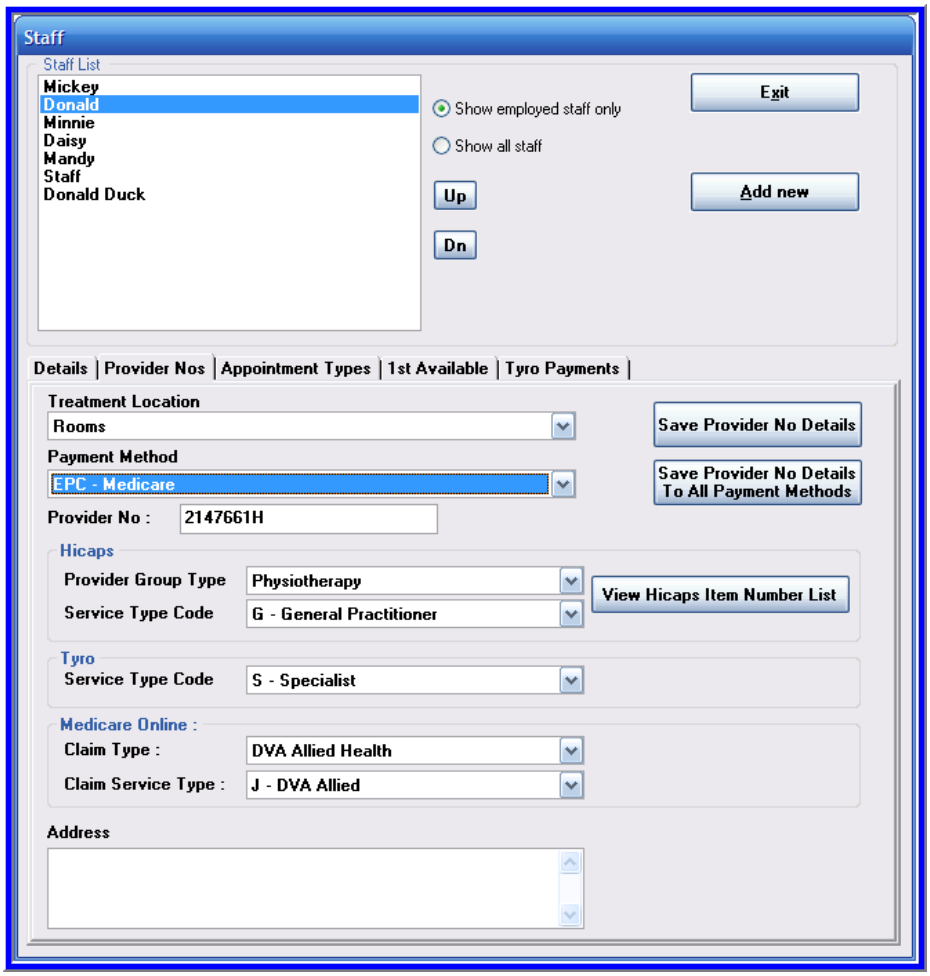


- Go to Setup
- Staff



- Select the staff member

- Click the Provider No tab.



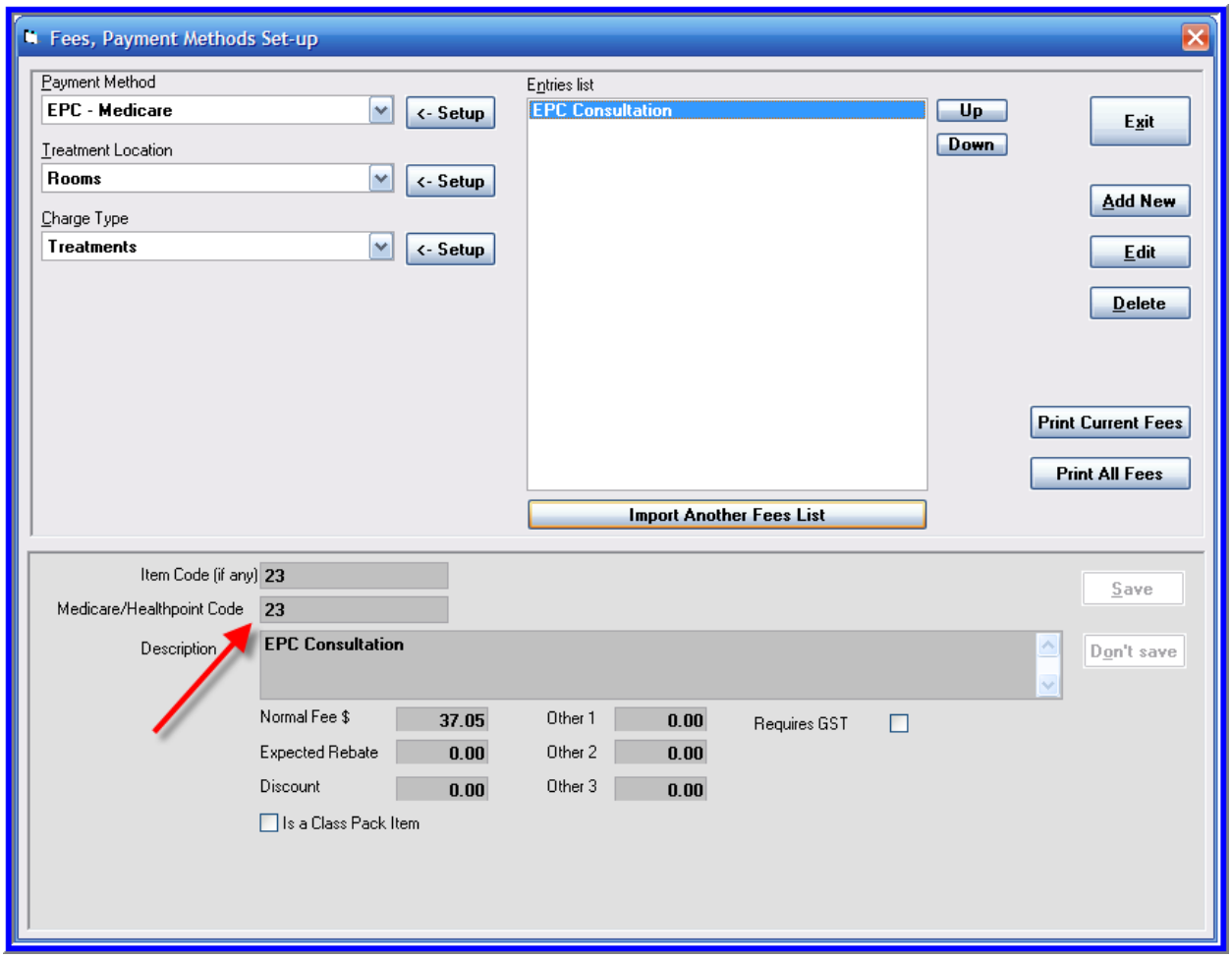
- Select your Medicare / EFT Payment Method
- Select Hicaps Provider Group Type
- Select Service Type Code
- Enter your provider number

- Click Save Provider Details
- You must do this for **ALL** staff members

2.6 HICAPS - Fees & charges setup for EPC

From the Main Menu

- Go to Setup
- Fees + Charges Setup
- Change Fees + Charges



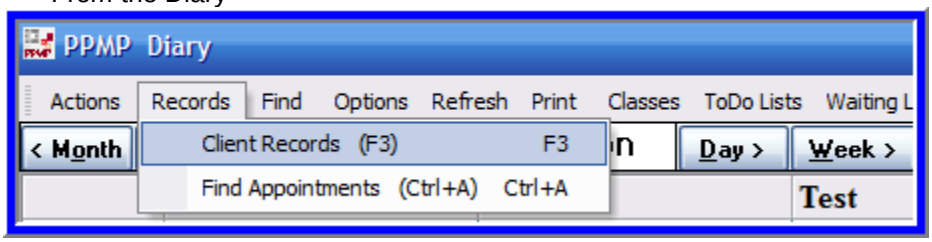
- Select the Medicare / EPC Payment Method
- Add or edit the Fees

  NB: Make sure the appropriate item code is entered into the Medicare/Healthpoint Code field.

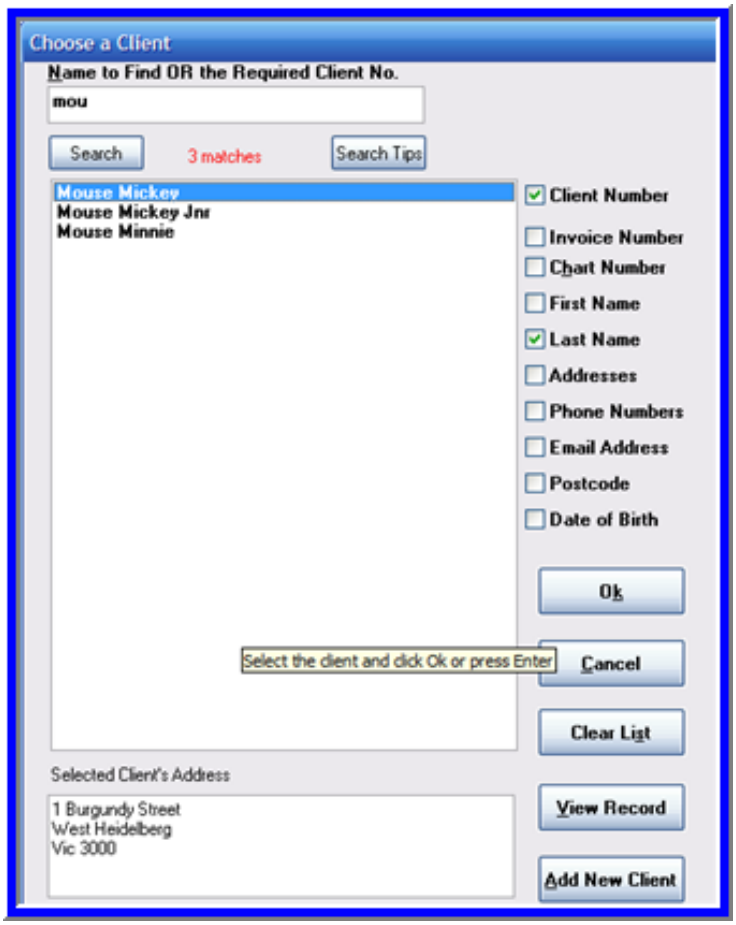
2.7 HICAPS - Medicare/EPC Episode

2.8 Client setup/create a new client record or setup

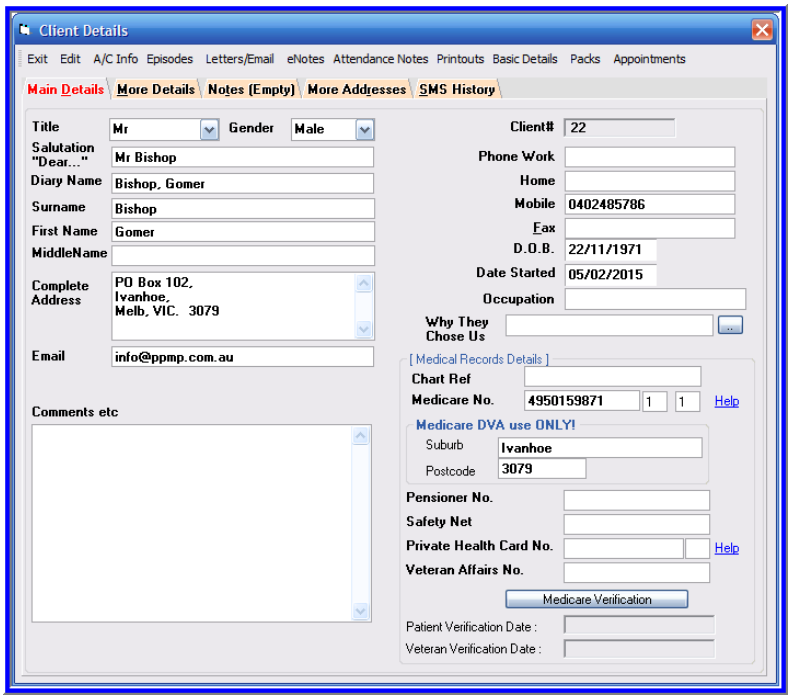
From the Diary



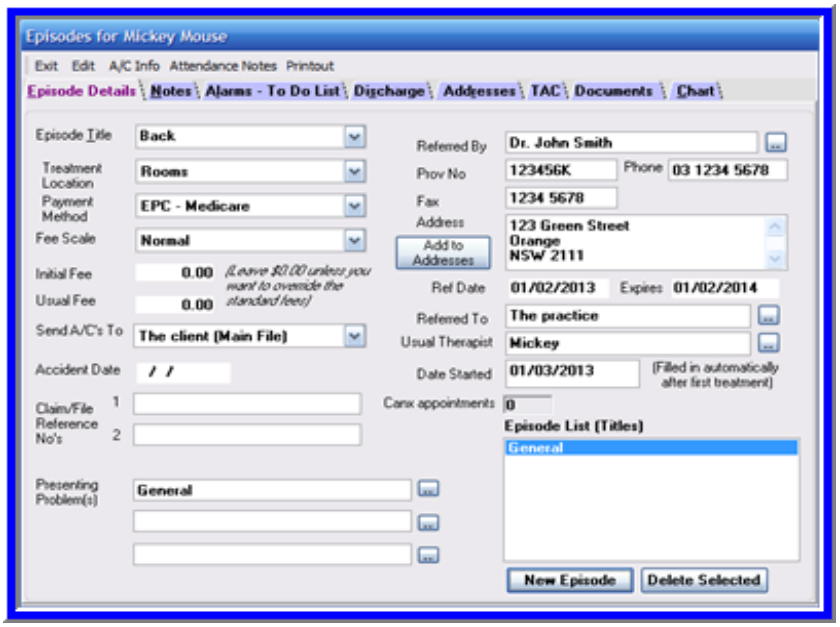
- Go to Records
- Client Records



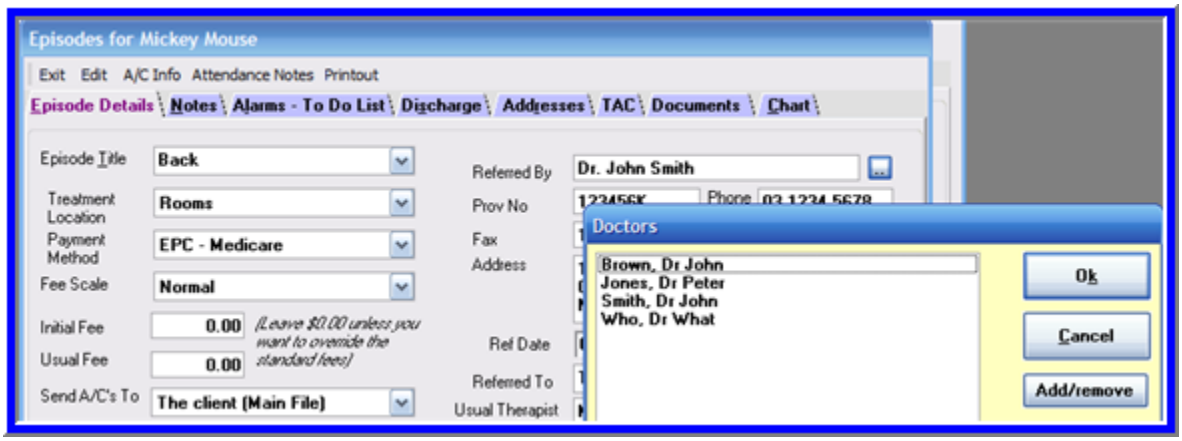
- Search for the client name or add a new client.



- Complete the Client Details (including with the Medicare No if known
  If not known - it will completed automatically after you swipe the client's Medicare Card



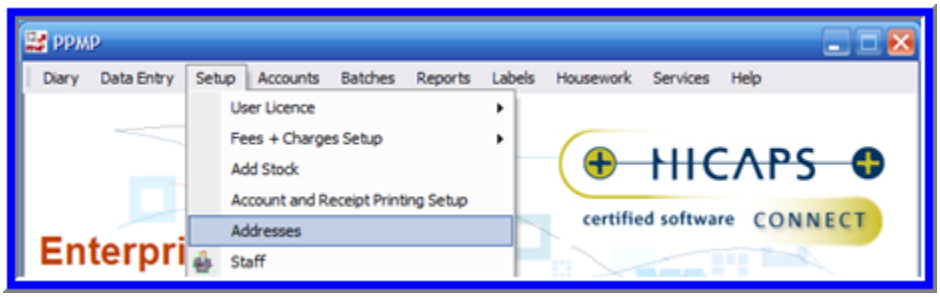
- Fill in ALL the episode details
- Select the correct Payment Method
- Enter the referral details.



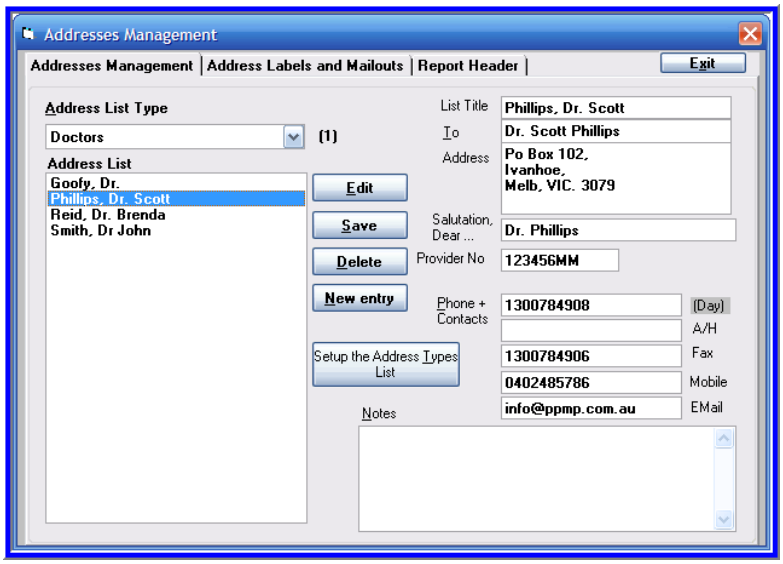
- Use the browse button to select a doctor from the list or enter the information at the time.

2.9 Referring doctors setup

From the Main Menu



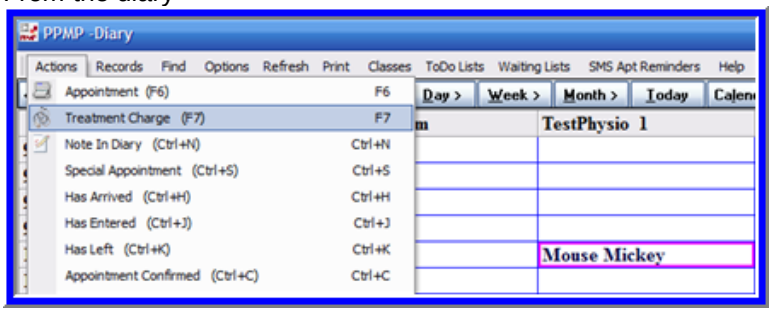
- Go to Setup
- Addresses



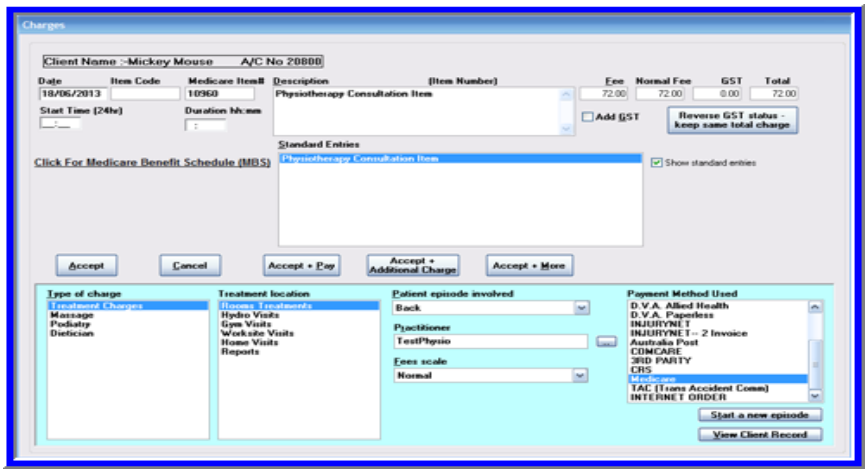
- Add or Edit the address list of the doctors
  (Including Doctor's provider numbers)

2.10 HICAPS - Charging a client & submitting a BulkBill claim to Medicare

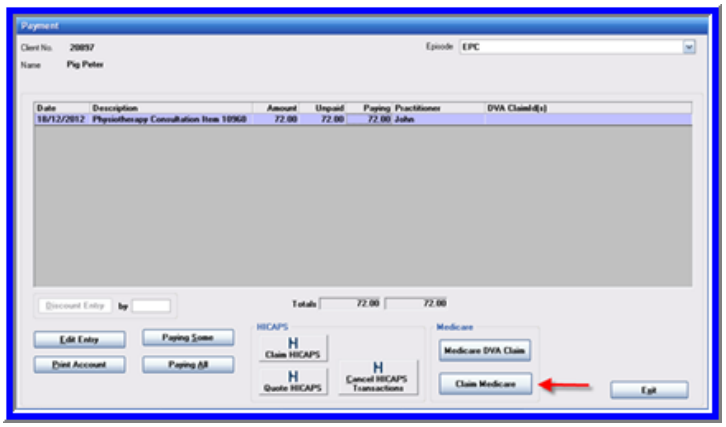
From the diary


PPMP -Diary
Actions Records Find Options Refresh Print Classes ToDo Lists Waiting Lists SMS Apt Reminders Help
Appointment (F6) F6
Treatment Charge (F7) F7
Note In Diary (Ctrl+N) Ctrl+N
Special Appointment (Ctrl+S) Ctrl+S
Has Arrived (Ctrl+H) Ctrl+H
Has Entered (Ctrl+J) Ctrl+J
Has Left (Ctrl+K) Ctrl+K
Appointment Confirmed (Ctrl+C) Ctrl+C
Day > Week > Month > Today
TestPhysio 1
Mouse Mickey

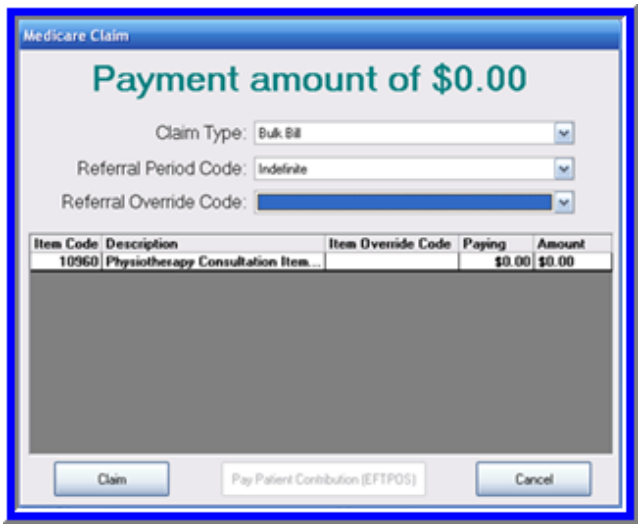
- Select Client
- Click Actions
- Select Treatment Charge



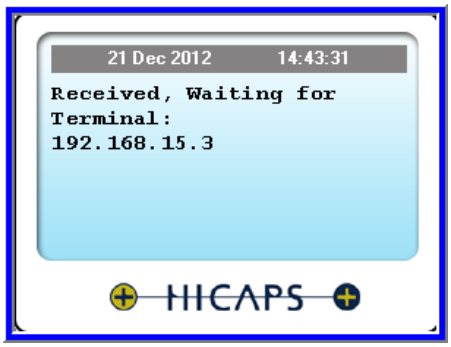
- Select the charge from the entires list
- Make sure all details are correct including Medicare Item No.
- Check the Episode, Payment Method & Practitioner.
- If the client details have been setup correctly, all information will be pre filled.
- Press Accept and Pay



- Double click in the Paying field
- Press the Claim Medicare Button.



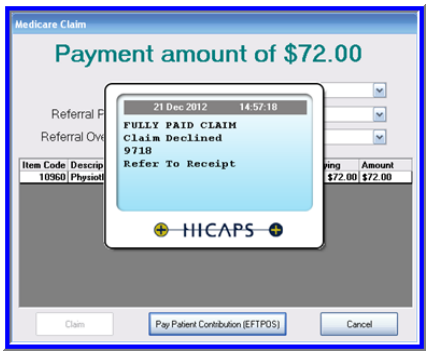
- Select the appropriate Claim Type, Referral Period & Referral Overrite from the drop down list, i.e. Bulk Bill.
- Press Claim.



- Follow the prompts on the screen & terminal to process the claim.

- Follow the prompts to process & print receipts

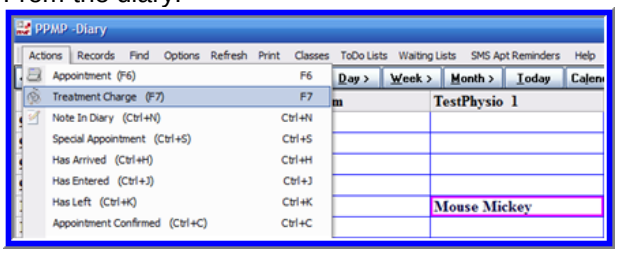
You will be advised of the outcome of the claim*



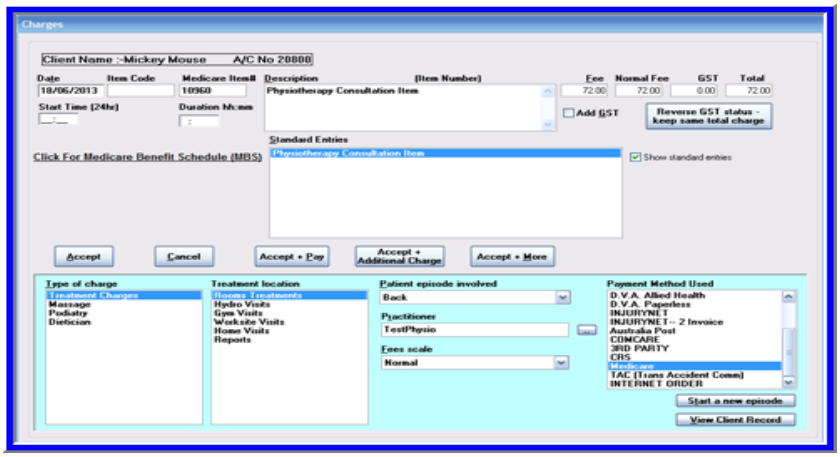
- *for testing purposes this screen shot has been included.

2.11 HICAPS - Charging a client & submitting a fully, part or unpaid claim to Medicare

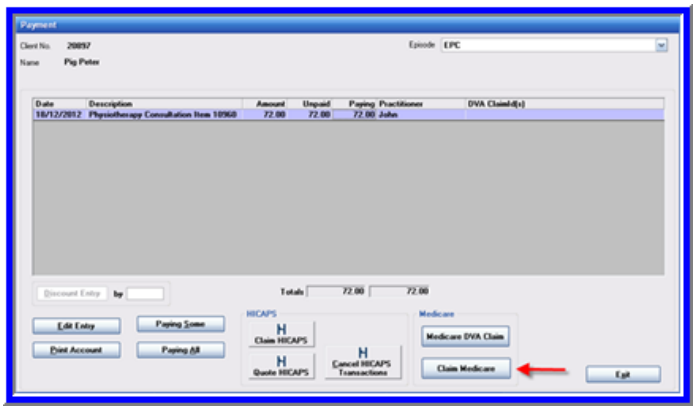
From the diary.


PPMP -Diary
Actions Records Find Options Refresh Print Classes ToDo Lists Waiting Lists SMS Apt Reminders Help
Appointment (F6) F6
Treatment Charge (F7) F7
Note In Diary (Ctrl+N) Ctrl+N
Special Appointment (Ctrl+S) Ctrl+S
Has Arrived (Ctrl+H) Ctrl+H
Has Entered (Ctrl+J) Ctrl+J
Has Left (Ctrl+K) Ctrl+K
Appointment Confirmed (Ctrl+C) Ctrl+C
Day > Week > Month > Today
TestPhysio 1
Mouse Mickey

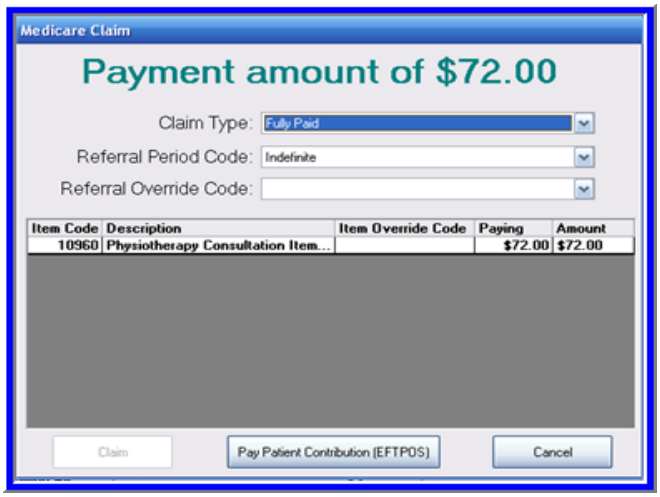
- Select the client
- Click Treatment Charge



- Select the charge from the entires list, make sure all details are correct including Medicare Item No.
- Check the Episode, Payment Method & Practitioner. (If the client details have been setup correctly, all information will be pre filled)
- Press Accept & Pay the transaction

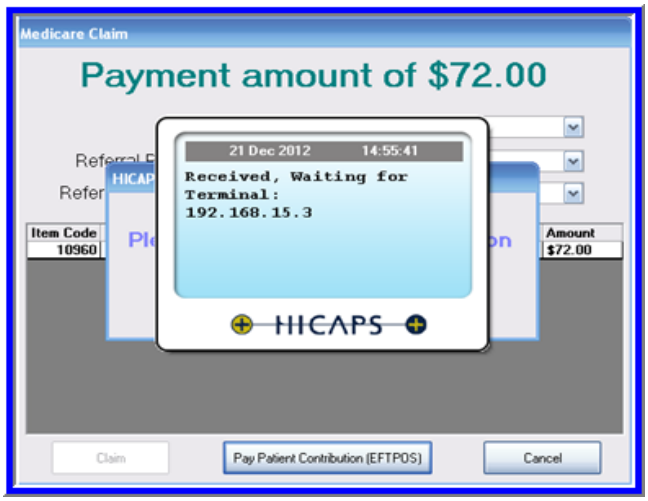


- Double click in the Paying field
- Click Claim Medicare Button.

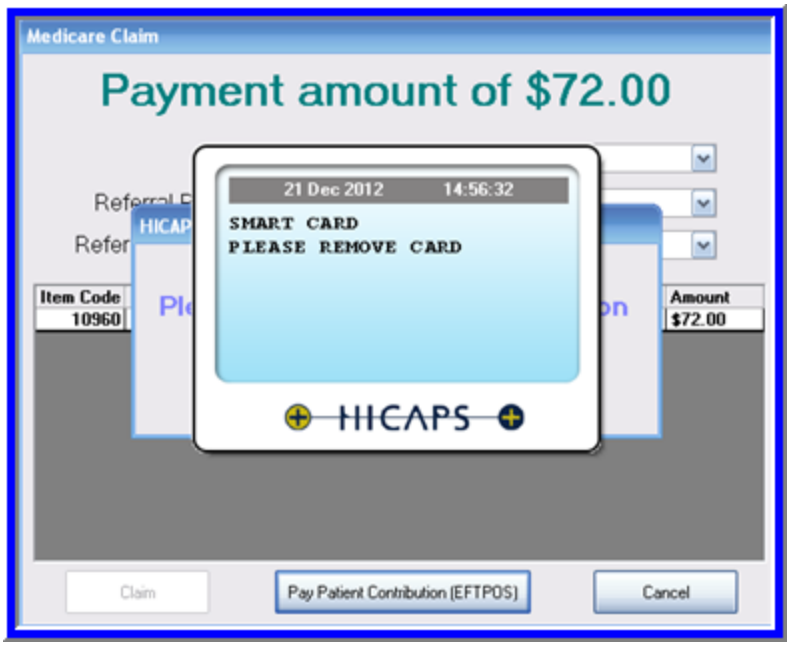


- Select the Claim Type

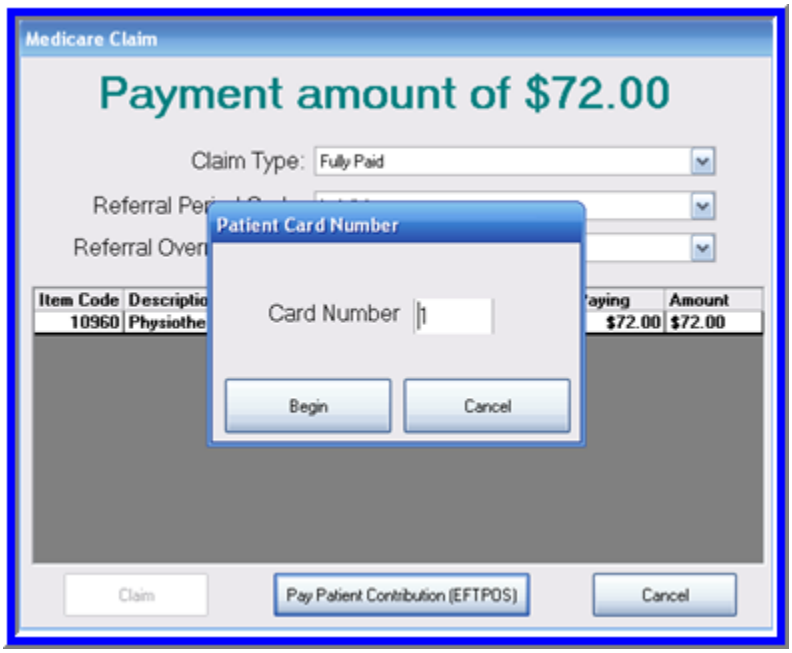
- Click Pay Patient Contribution (EFTPOS)
- If the Medicare Number is not filled out in the Patient Details, you are prompted to swipe/insert the card.



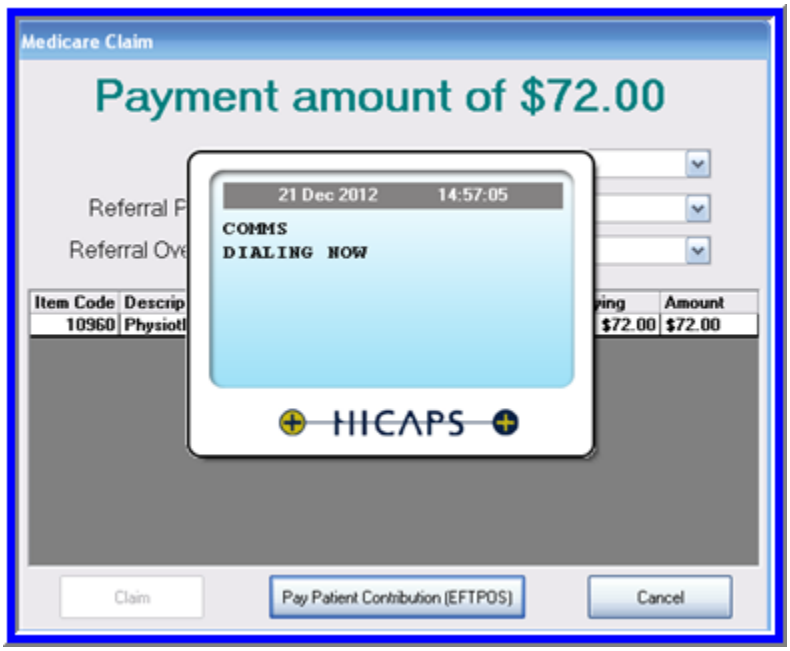
- Follow the prompts on the screen.



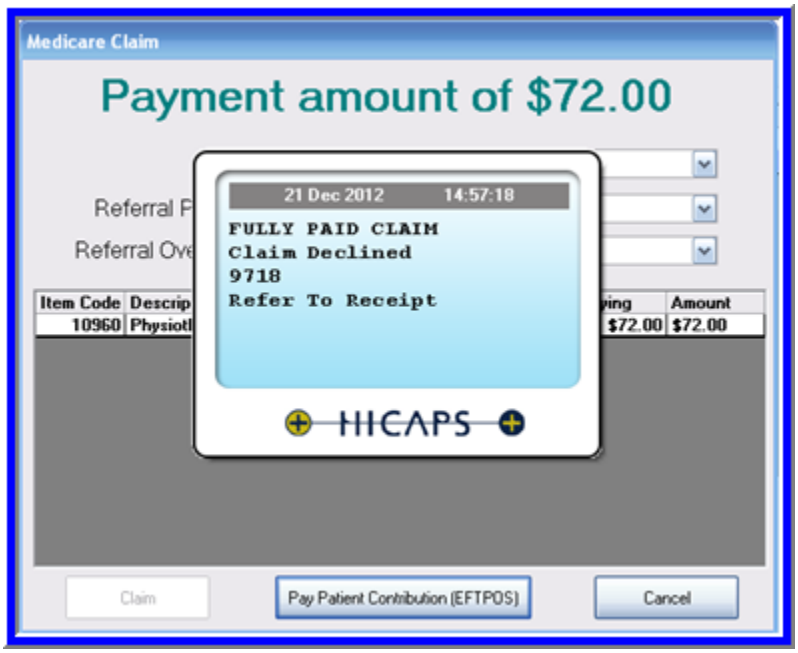
- Follow the prompts on the screen.



- If the Medicare Number is not filled out in the Patient Details screen, you will be prompted to swipe the card.



- Follow the prompts to complete the transaction



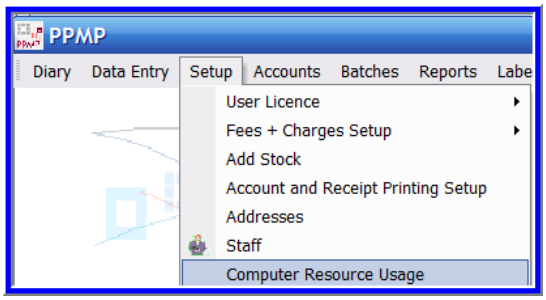
- Once the claim has been processed you will be advised of the outcome of the claim **for testing purposed this screen shot has been included.

3 TYRO

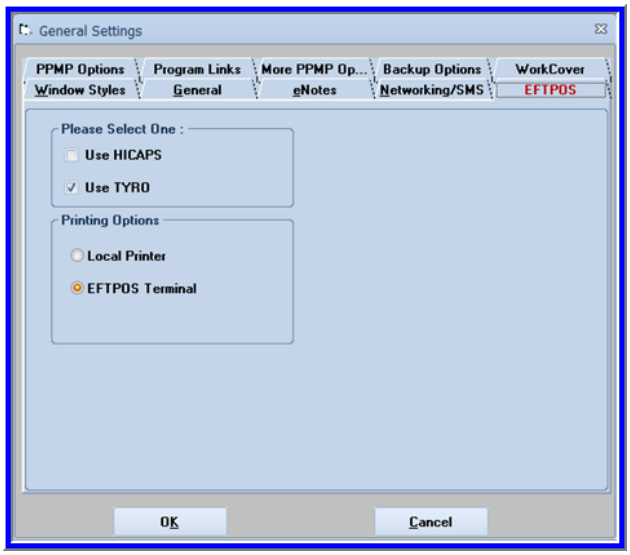
3.1 TYRO installation & activation

Click HERE to watch video

NB: If you are using the TYRO Integration you will need to Activate Tyro first.
From the Main Menu of PPMP®



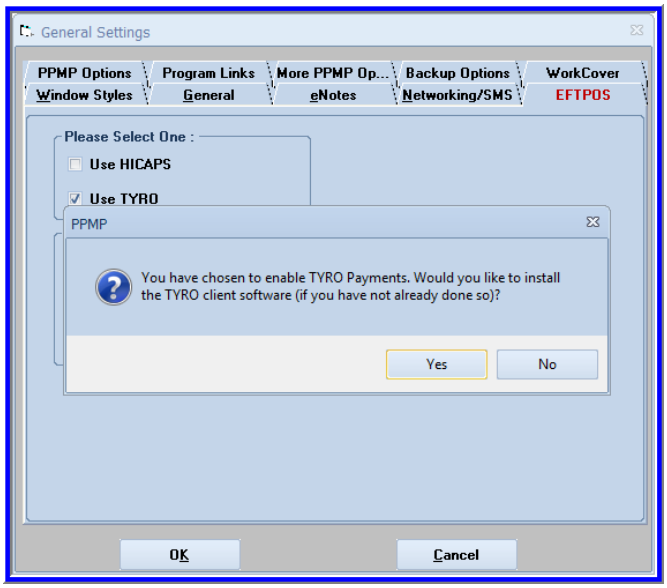
- Click on the Setup Menu
- Click on 'Computer Resource Usage'
- Click on the EFTPOS tab



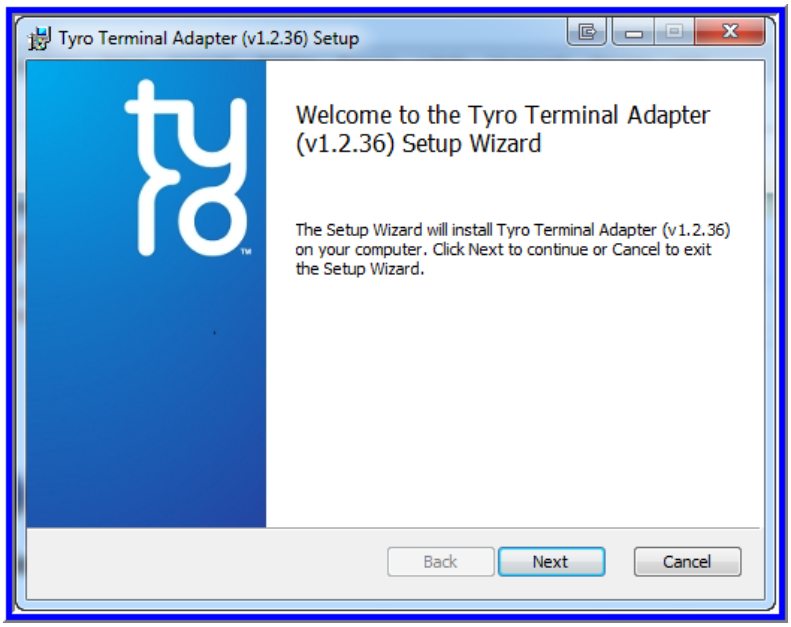
- Tick "Use TYRO"
- Tick "EFTPOS Terminal" – (for Printing direct to the terminal)
- Click OK

Restart the program for the activation to start.

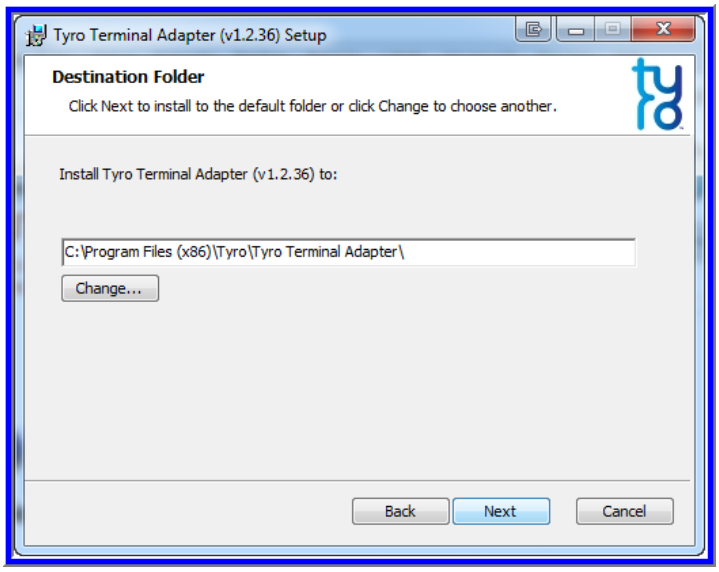
NB: If this is the first time you do not already have the correct Tyro software installed on your computer you will be prompted to install it. (see below)



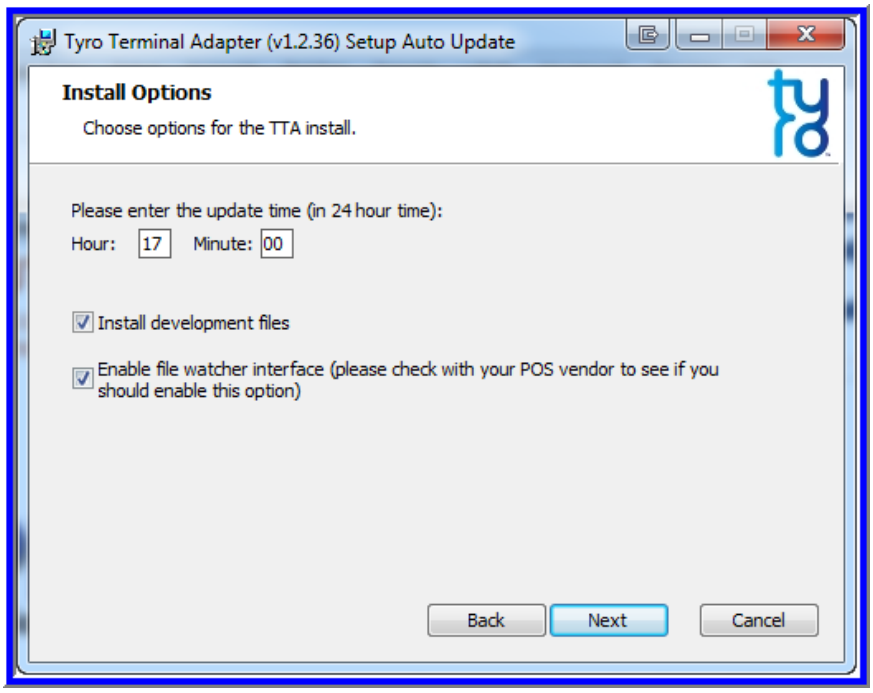
- Click YES to install TYRO software.


Tyro Terminal Adapter (v1.2.36) Setup
Welcome to the Tyro Terminal Adapter (v1.2.36) Setup Wizard
The Setup Wizard will install Tyro Terminal Adapter (v1.2.36) on your computer. Click Next to continue or Cancel to exit the Setup Wizard.
Back
Next
Cancel

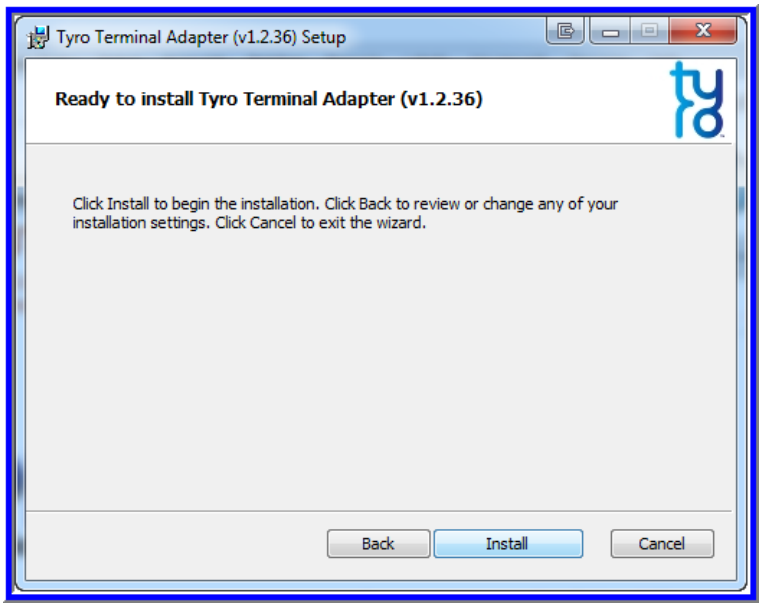
- Click Next


Tyro Terminal Adapter (v1.2.36) Setup
Destination Folder
Click Next to install to the default folder or click Change to choose another.
Install Tyro Terminal Adapter (v1.2.36) to:
C:\Program Files (x86)\Tyro\Tyro Terminal Adapter\
Change...
Back
Next
Cancel

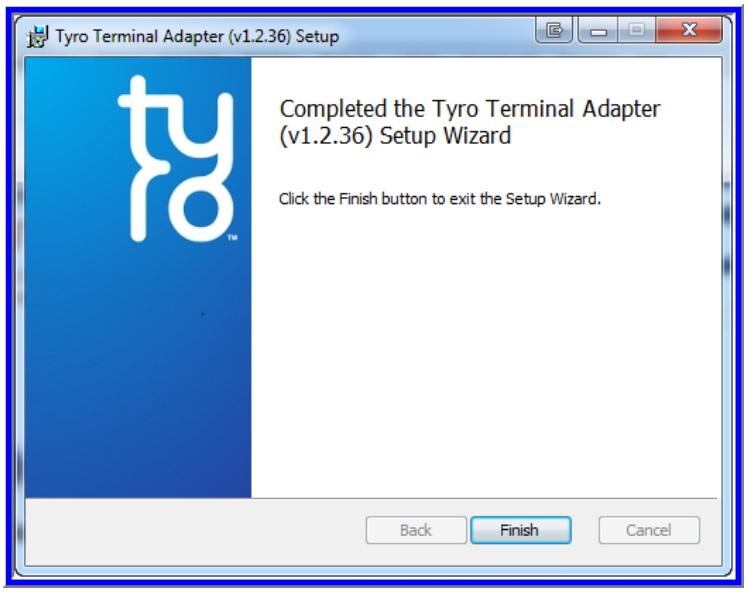
- Click Next


Tyro Terminal Adapter (v1.2.36) Setup Auto Update
Install Options
Choose options for the TTA install.
Please enter the update time (in 24 hour time):
Hour: 17 Minute: 00
Install development files
Enable file watcher interface (please check with your POS vendor to see if you should enable this option)
Back
Next
Cancel

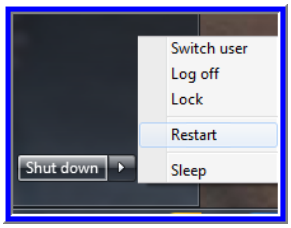
- Select an Auto Update time (this is for TYRO software only)
- Click Next


Tyro Terminal Adapter (v1.2.36) Setup
Ready to install Tyro Terminal Adapter (v1.2.36)
Click Install to begin the installation. Click Back to review or change any of your installation settings. Click Cancel to exit the wizard.
Back
Install
Cancel

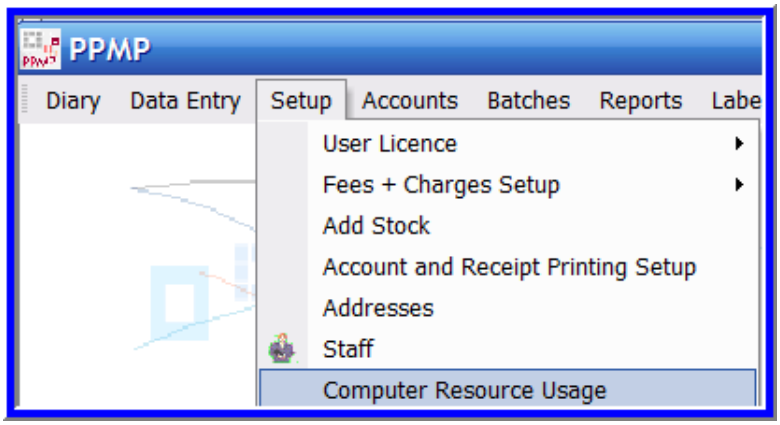
- Click Install


Tyro Terminal Adapter (v1.2.36) Setup
Completed the Tyro Terminal Adapter (v1.2.36) Setup Wizard
Click the Finish button to exit the Setup Wizard.
Back
Finish
Cancel

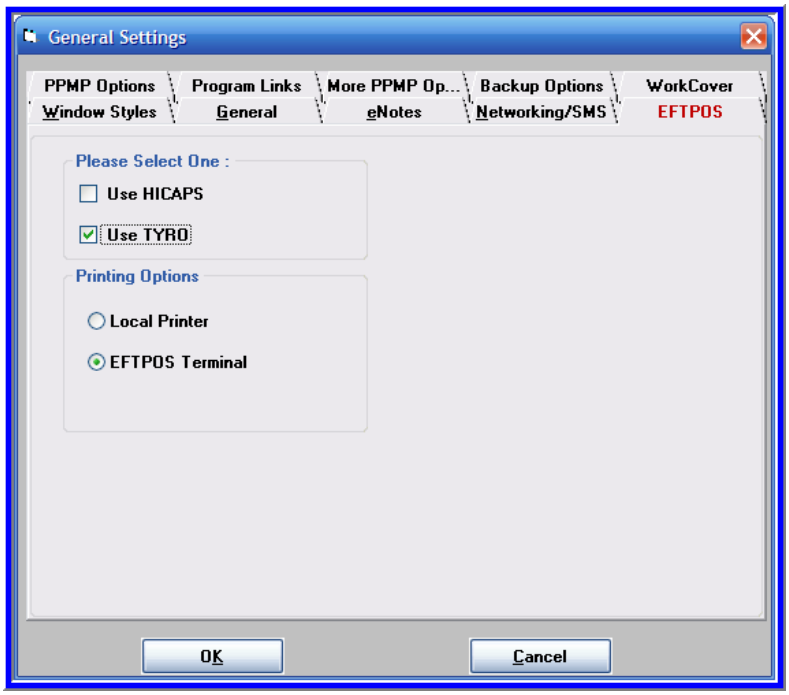
- Click Finish



- Once the reboot is complete restart PPMP®.



- From the Main Menu of PPMP®
- Click on the Setup Menu
- Click on 'Computer Resource Usage'



- Click on the EFTPOS tab
- Click OK
- Tick "Use TYRO"
- Tick "EPFTPOS Terminal"
- Click OK

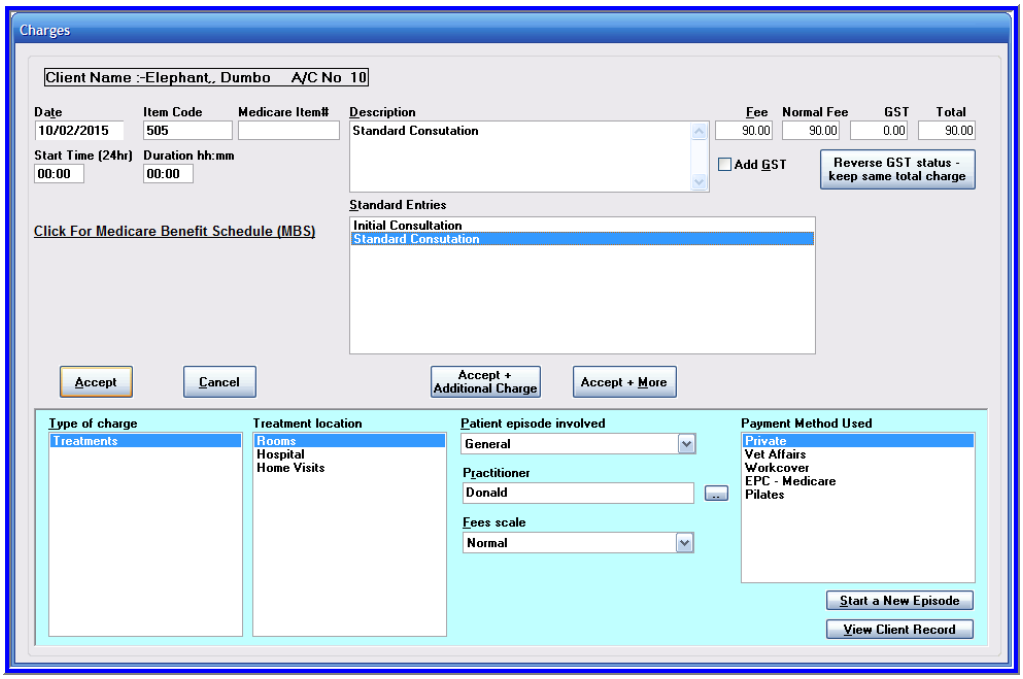
Restart the program for the activation to start.

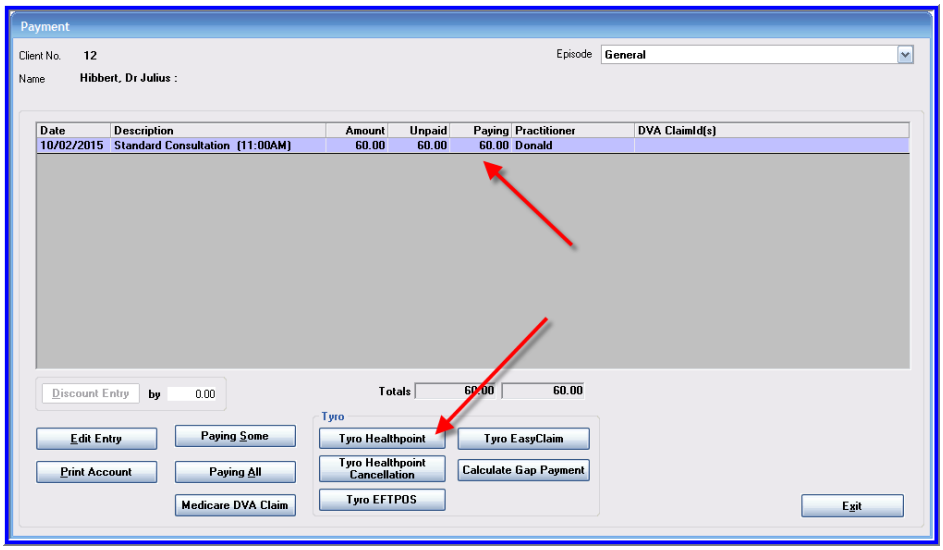
3.2 Using TYRO with PPMP®

Click HERE to watch video

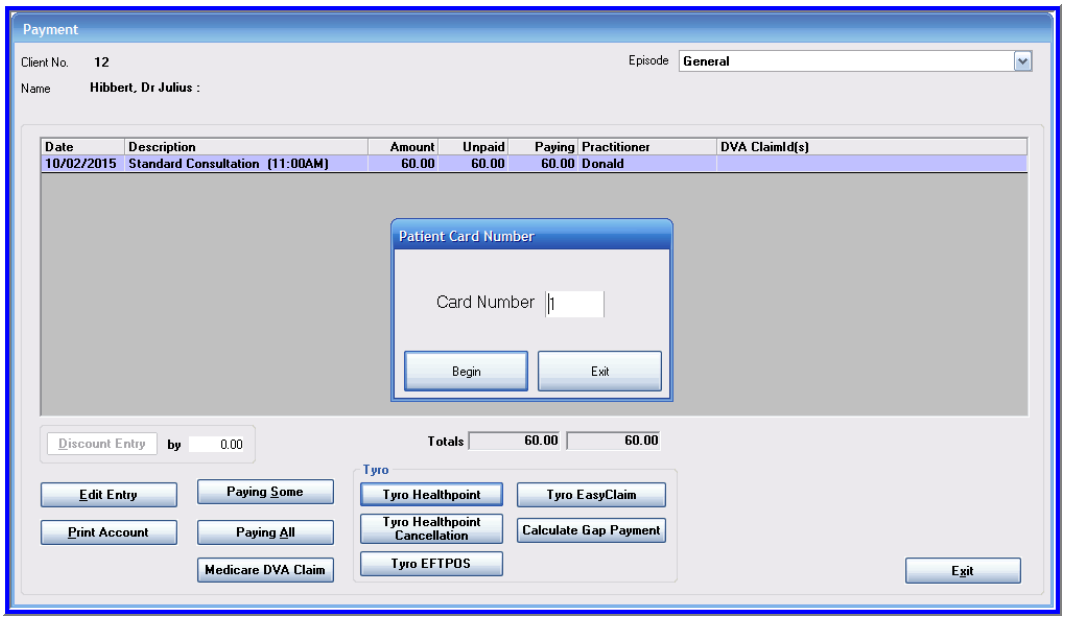
3.3 Processing a claim

- From the PPMP® Diary, Treatment Charge & accept payment from the patient.
- (Ensure you have setup item codes for TYRO in the Fee's & charges Setup)





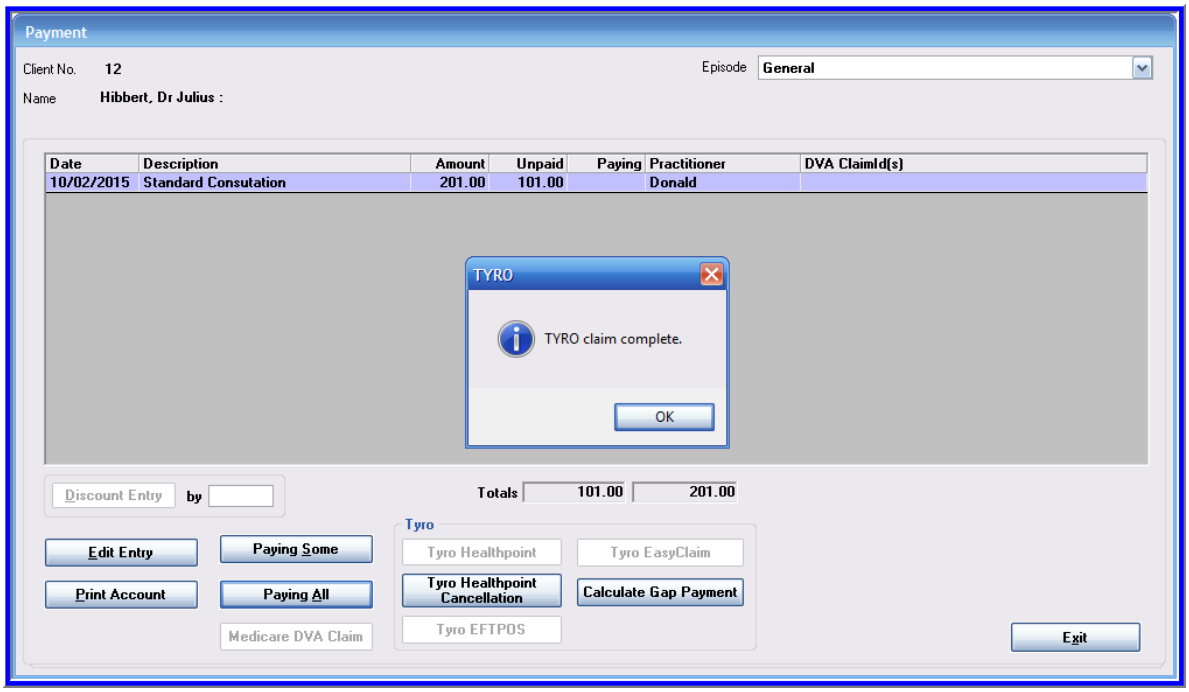
- Double click in the "paying" field to enter the full payment amount, select the Tyro Healthpoint button.



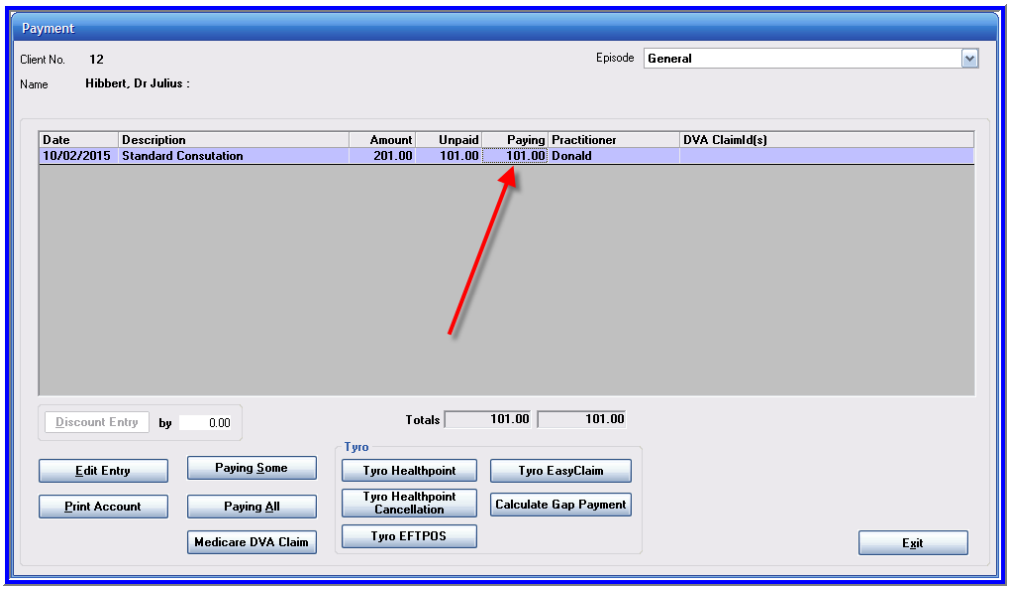
- Enter the number corresponding with the patient name & press begin.
- PPMP® will display the following message

- The Tyro terminal will prompt you to swipe the patient's card.

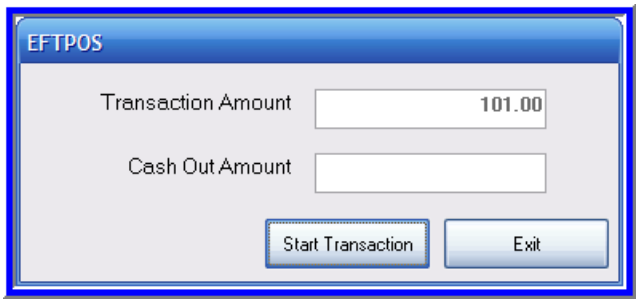
- Click accept to accept and process the health insurance claim.



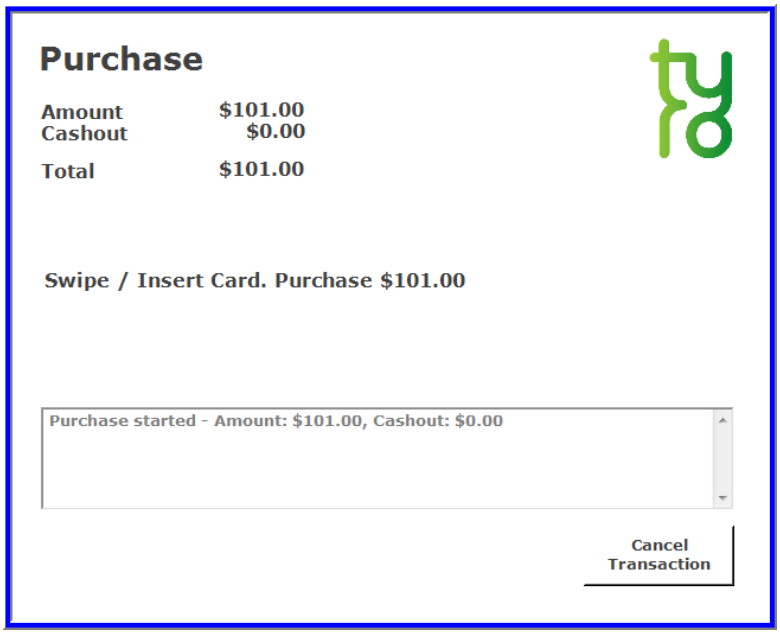
- Once the process has completed successfully PPMP® will return you to the payment window, you will notice the Tyro claim amount has already been deducted from the total amount owing, you can pay the remaining balance or exit.



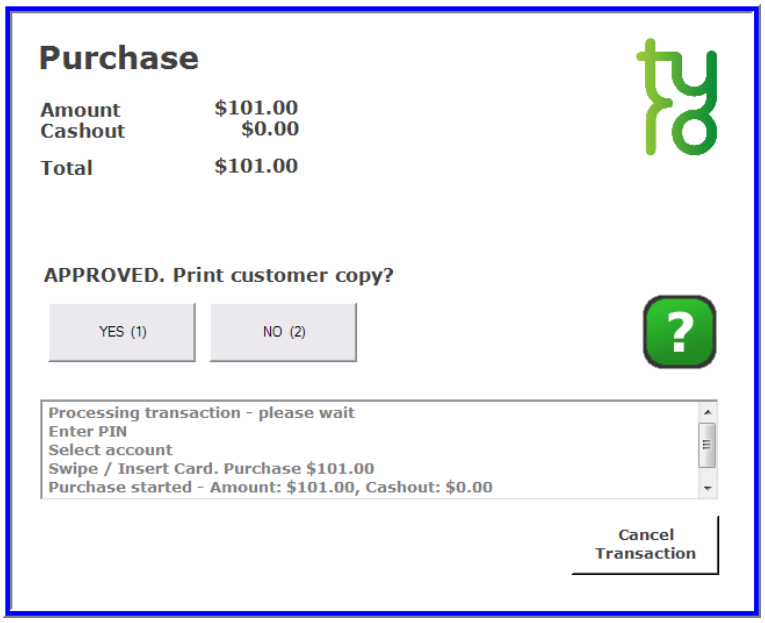
- To pay via EFTPOS Payment, enter the amount & select Tyro EFTPOS.



- Check the amount entered and click start Transaction.



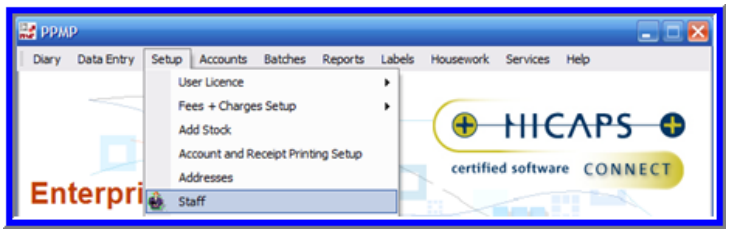
- The Tyro terminal will prompt you to swipe the patient's card.



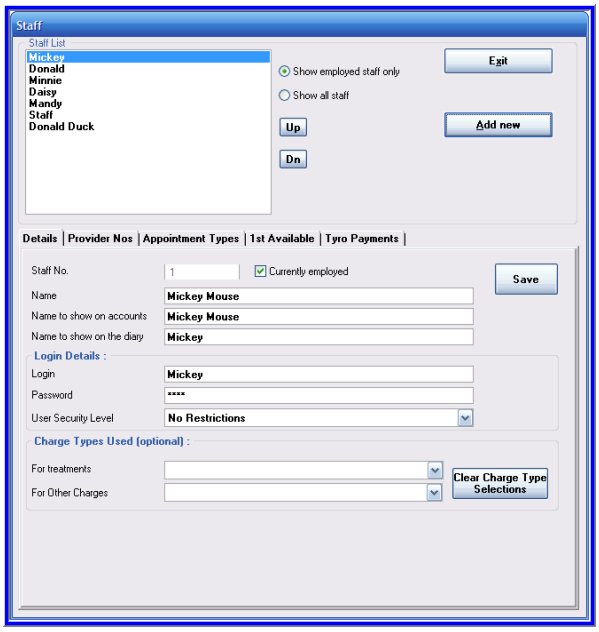
- Complete the transaction on the Tyro terminal & click yes to print a customer copy.

3.4 TYRO - Medicare EasyClaim & staff setup

From the Main Menu

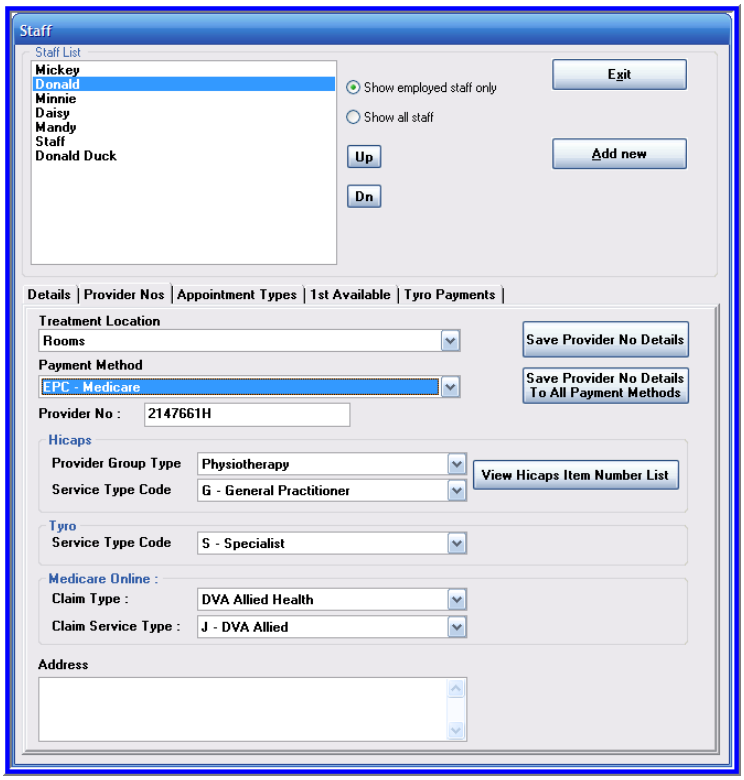


- Go to Setup
- Staff



- Select the staff member

- Click the Provider No tab.



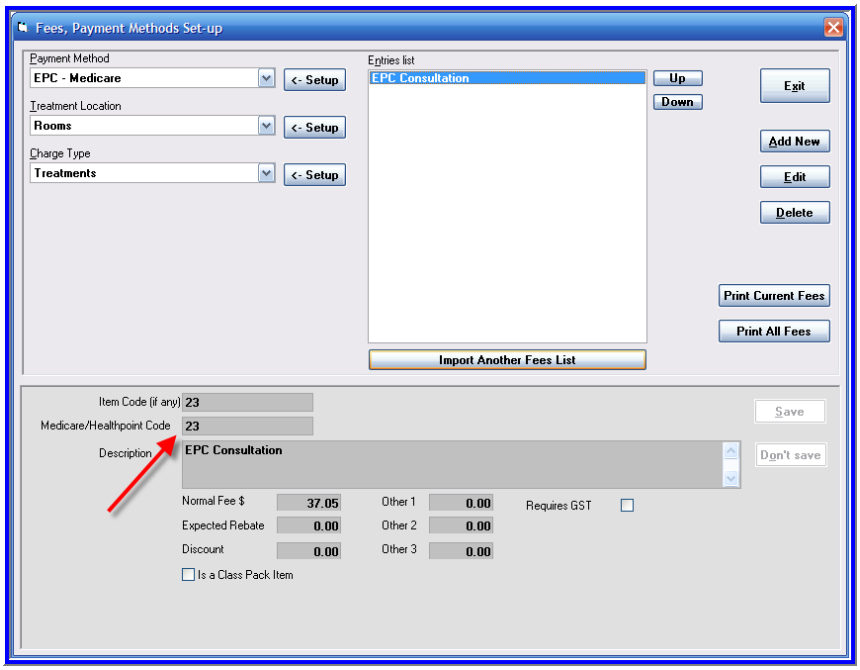
- Select your Medicare / EFT Payment Method
- Select the Service Type Code for TYRO
- Enter your provider number

- Click Save Provider Details
- You must do this for **ALL** staff members

3.5 TYRO - Fees & charges Setup for EPC

From the Main Menu

- Go to Setup
- Fees + Charges Setup
- Change Fees + Charges



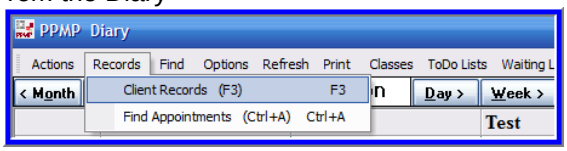
- Select the Medicare / EPC Payment Method
- Add or edit the Fees

  NB: Make sure the appropriate item code is entered into the Medicare/Healthpoint Code field.

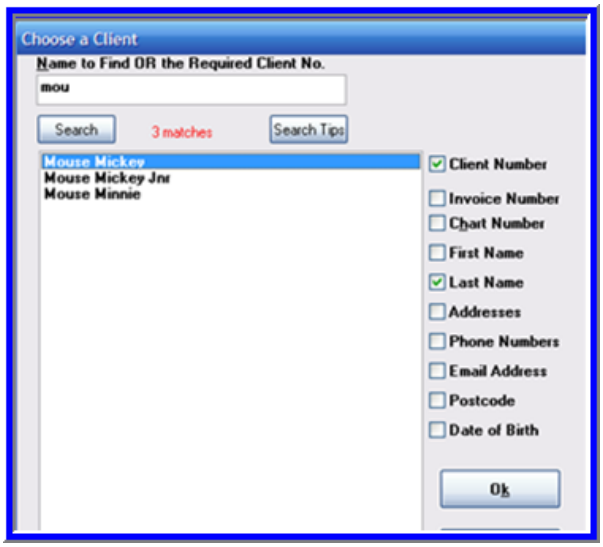
3.6 TYRO - Medicare/EPC episode

3.7 Client setup/create a new client record or setup

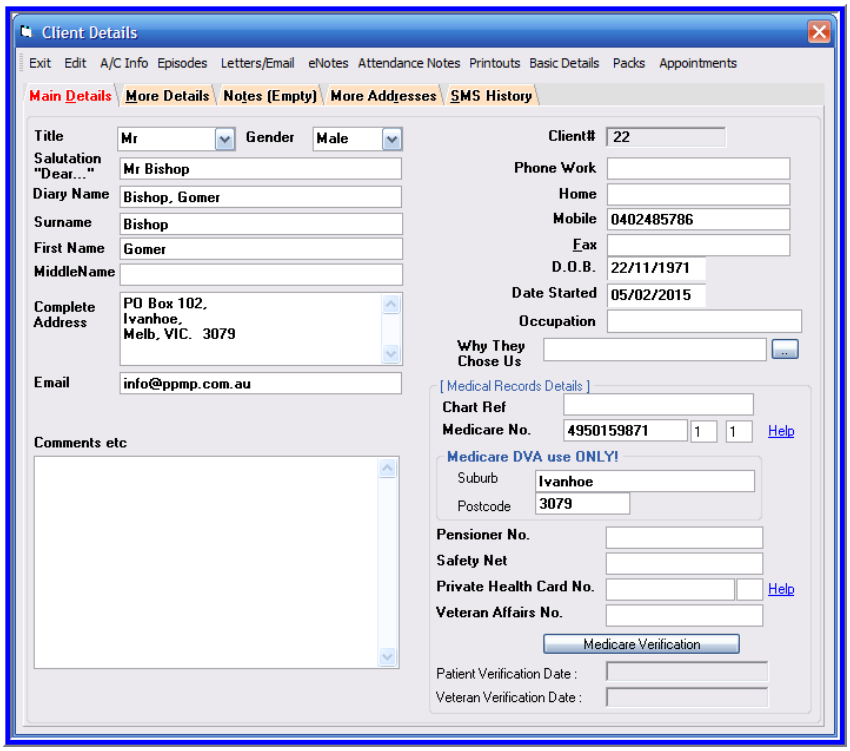
From the Diary



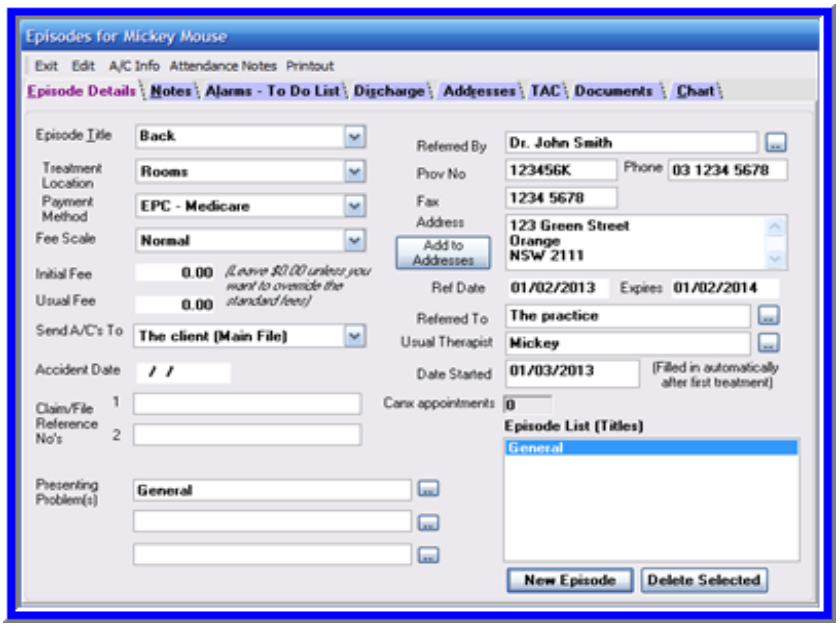
- Go to Records
- Client Records



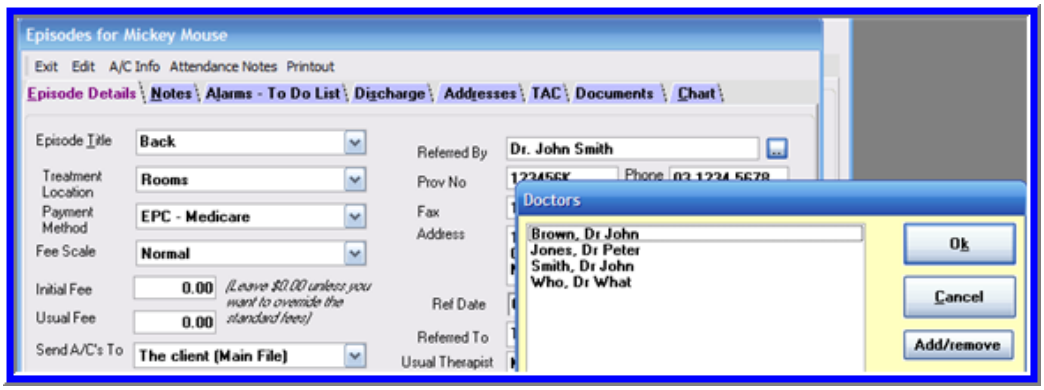
- Search for the client name or add a new client.



- Complete the Client Details (including with the Medicare No if known
  If not known - it will completed automatically after you swipe the client's Medicare Card


Episodes for Mickey Mouse
Exit Edit A/C Info Attendance Notes Printout
Episode Details Notes Alarms - To Do List Discharge Addresses TAC Documents Chart
Episode Title Back
Treatment Location Rooms
Payment Method EPC - Medicare
Fee Scale Normal
Initial Fee 0.00
Usual Fee 0.00
Send A/C's To The client (Main File)
Accident Date / /
Claim/File Reference No's 1 2
Presenting Problem(s) General
Referred By Dr. John Smith
Prov No 123456K
Phone 03 1234 5678
Fax 1234 5678
Address 123 Green Street Orange NSW 2111
Add to Addresses
Ref Date 01/02/2013
Expires 01/02/2014
Referred To The practice
Usual Therapist Mickey
Date Started 01/03/2013
(Filled in automatically after first treatment)
Canx appointments 0
Episode List (Titles)
General
New Episode
Delete Selected

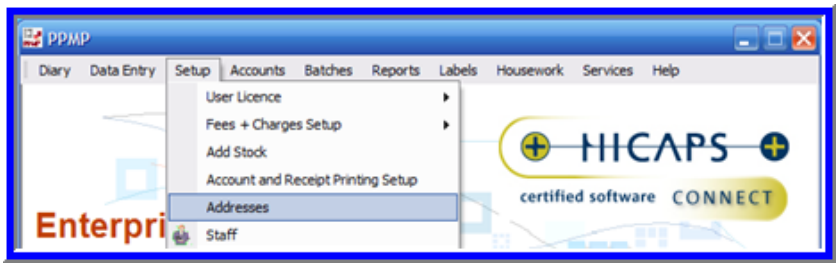
- Fill in ALL the episode details
- Select the correct Payment Method
- Enter the referral details.



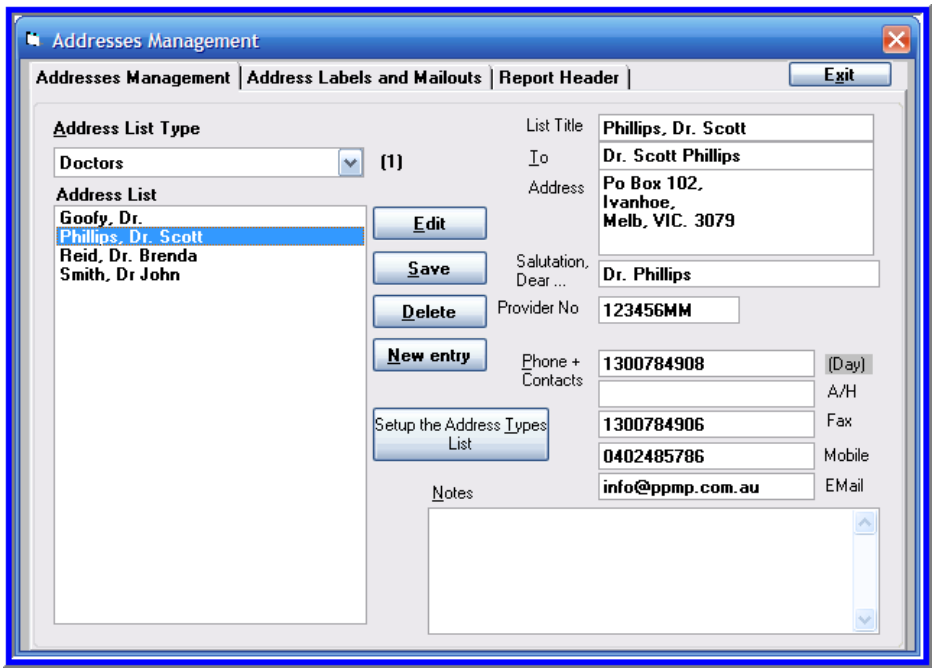
- Use the browse button to select a doctor from the list or
  Enter the information at the time.

3.8 Referring doctors setup

From the Main Menu



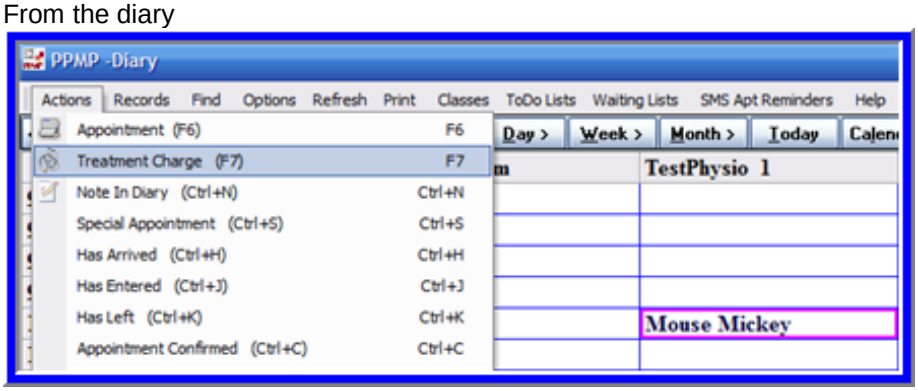
- Go to Setup
- Addresses



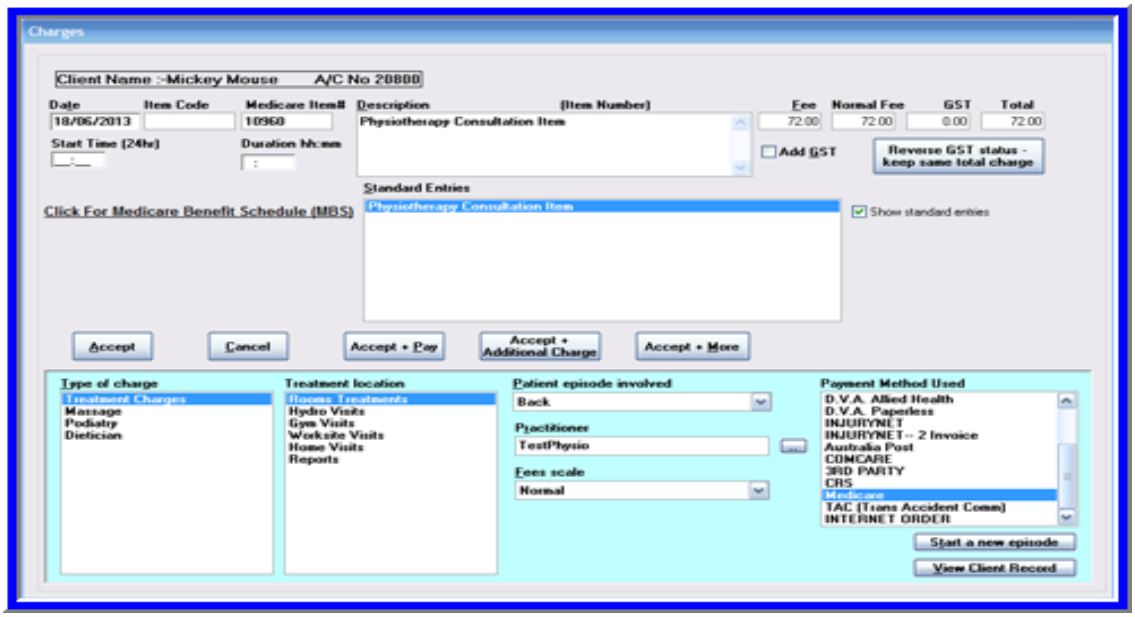
- Add or Edit the address list of the doctors
  (Including Doctor's provider numbers)

3.9 TYRO (Bulk Billing) - Charging a client & submitting a BulkBill claim to Medicare

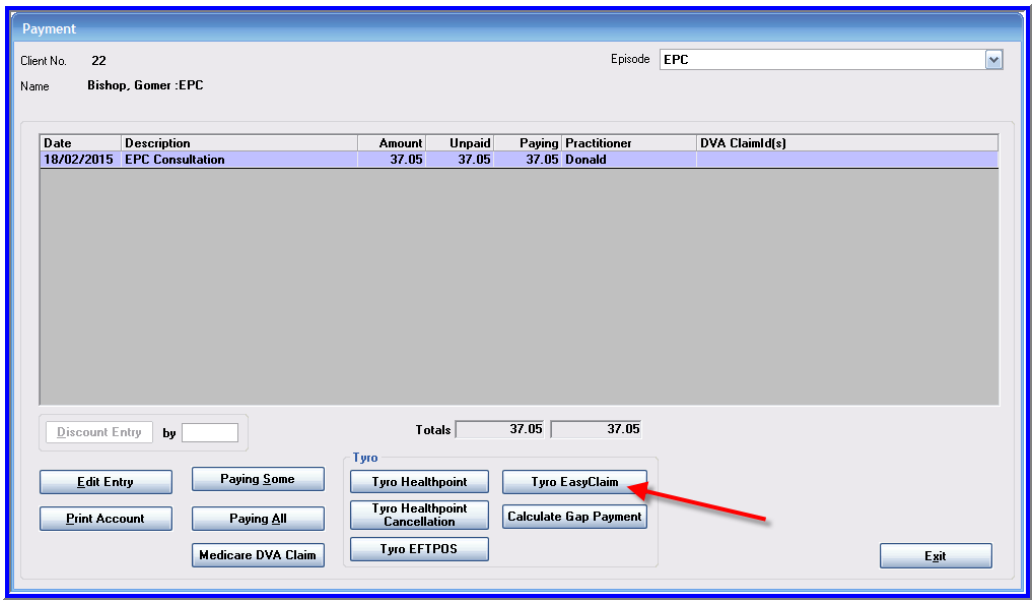
From the diary



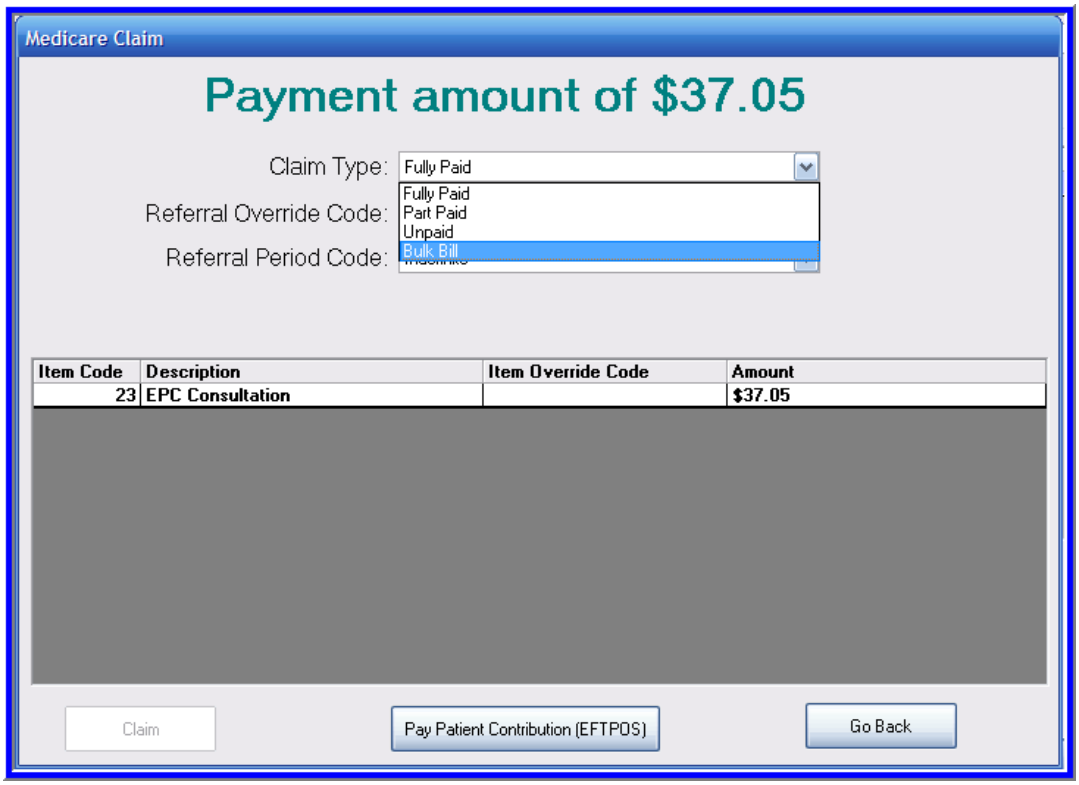
- Select Client
- Click Actions
- Select Treatment Charge



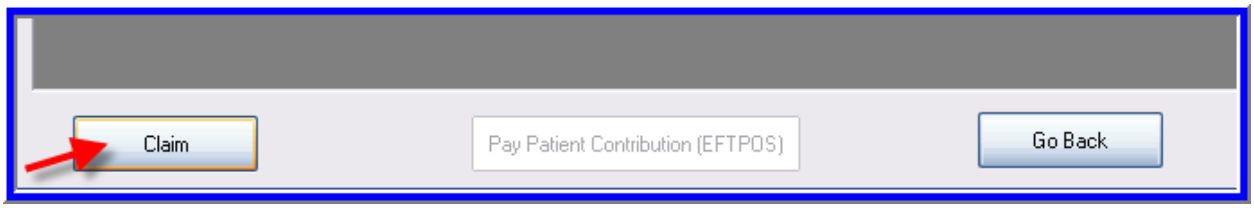
- Select the charge from the entires list
- Make sure all details are correct including Medicare Item No.
- Check the Episode, Payment Method & Practitioner.
- If the client details have been setup correctly, all information will be pre filled.
- Press Accept and Pay



- Double click in the Paying field
- Press the Tyro EasyClaim Button.



- Select the appropriate Claim Type, Referral Period & Referral Overrite from the drop down list, i.e. Bulk Bill.



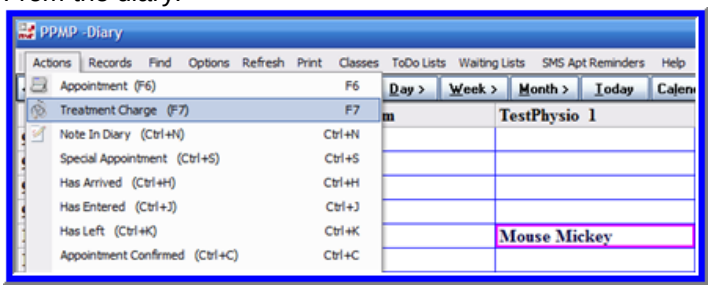
- Click Claim.

- Follow the prompts on the screen & terminal to process the claim.

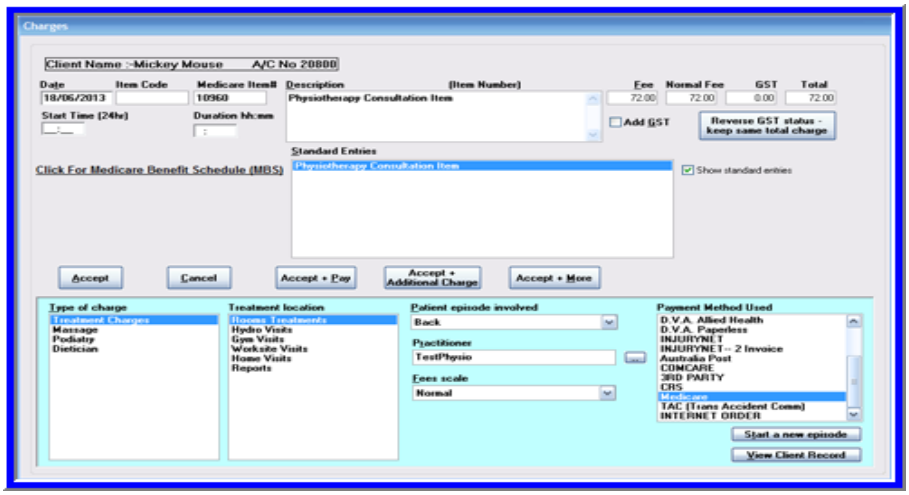
- Follow the prompts to process & print receipts

3.10 TYRO (Fully Paid)- Charging a client & submitting a fully, part or unpaid claim to Medicare

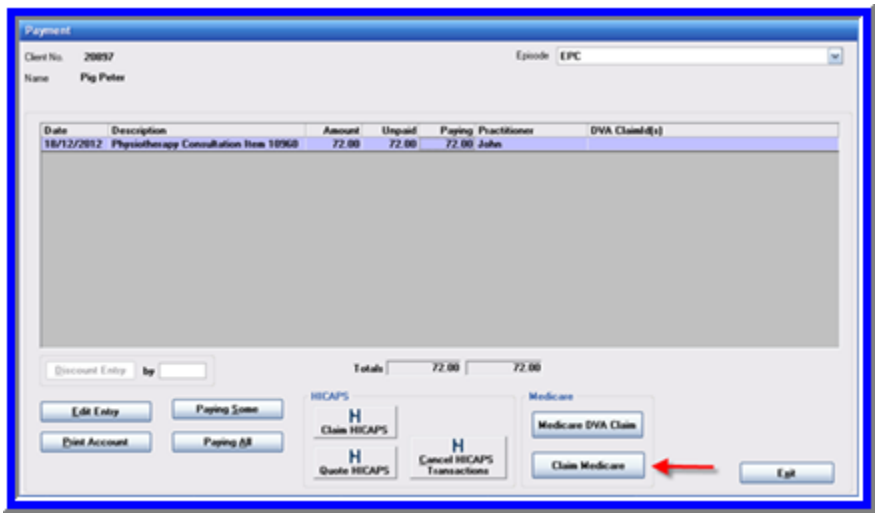
From the diary.


PPMP -Diary
Actions Records Find Options Refresh Print Classes ToDo Lists Waiting Lists SMS Apt Reminders Help
Appointment (F6) F6
Treatment Charge (F7) F7
Note In Diary (Ctrl+N) Ctrl+N
Special Appointment (Ctrl+S) Ctrl+S
Has Arrived (Ctrl+H) Ctrl+H
Has Entered (Ctrl+J) Ctrl+J
Has Left (Ctrl+K) Ctrl+K
Appointment Confirmed (Ctrl+C) Ctrl+C
Day > Week > Month > Today
TestPhysio 1
Mouse Mickey

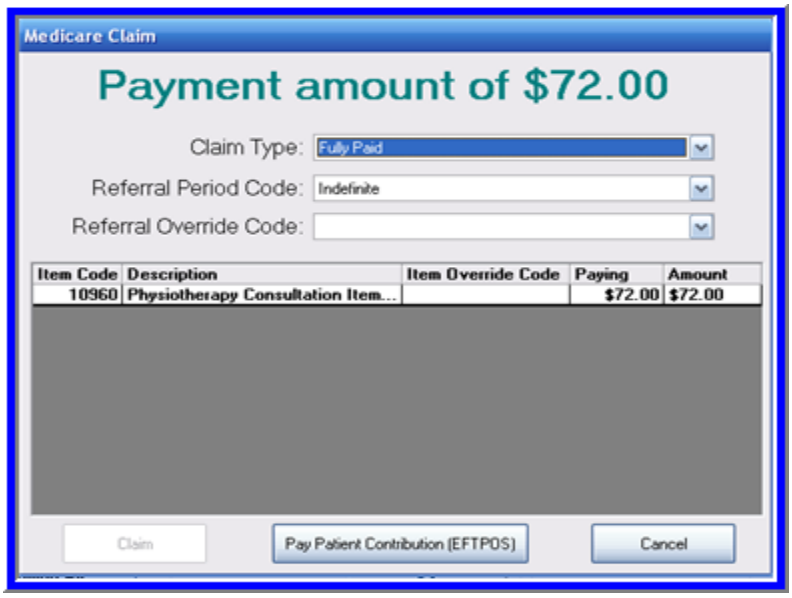
- Select the client
- Click Treatment Charge



- Select the charge from the entires list, make sure all details are correct including Medicare Item No.
- Check the Episode, Payment Method & Practitioner. (If the client details have been setup correctly, all information will be pre filled)
- Press Accept & Pay the transaction

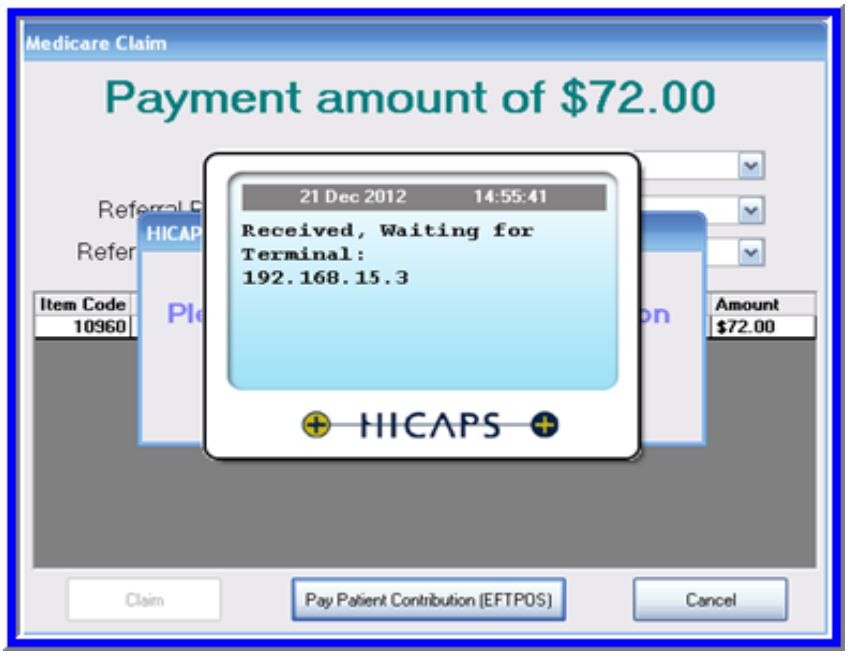


- Double click in the Paying field
- Click Claim Medicare Button.

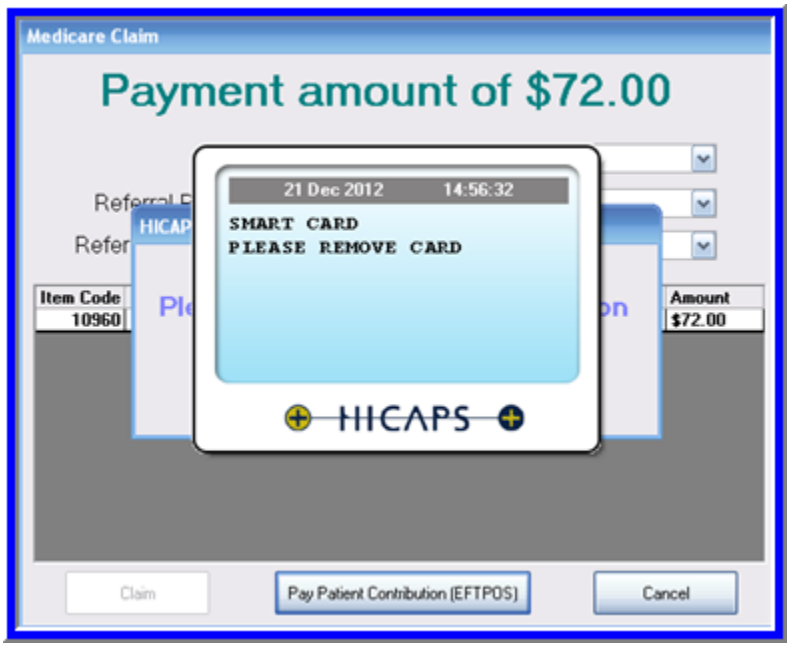

Medicare Claim
Payment amount of $72.00
Claim Type: Fully Paid
Referral Period Code: Indefinite
Referral Override Code:
Item Code | Description | Item Override Code | Paying | Amount
10960 | Physiotherapy Consultation Item... | | $72.00 | $72.00
Claim
Pay Patient Contribution (EFTPOS)
Cancel

- Select the Claim Type

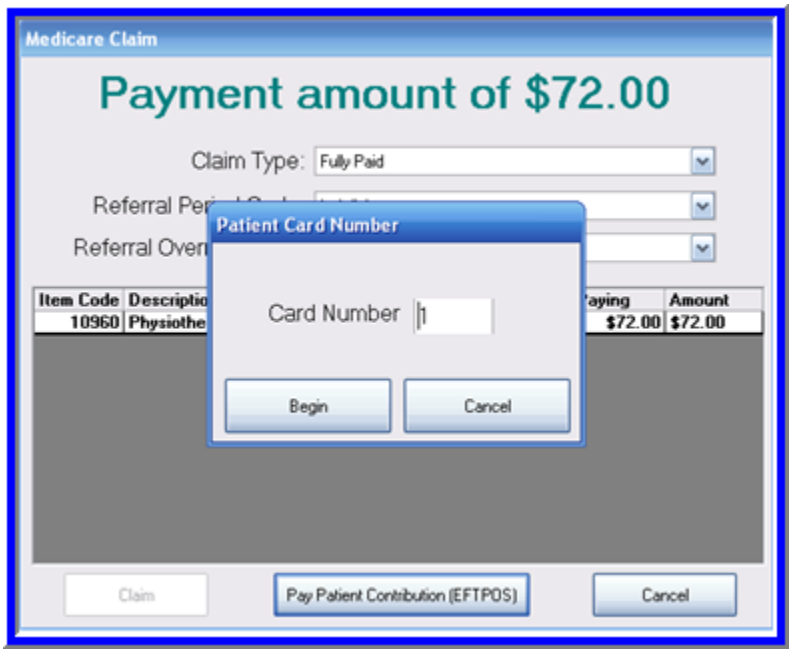
- Click Pay Patient Contribution (EFTPOS)
- If the Medicare Number is not filled out in the Patient Details, you are prompted to swipe/insert the card.



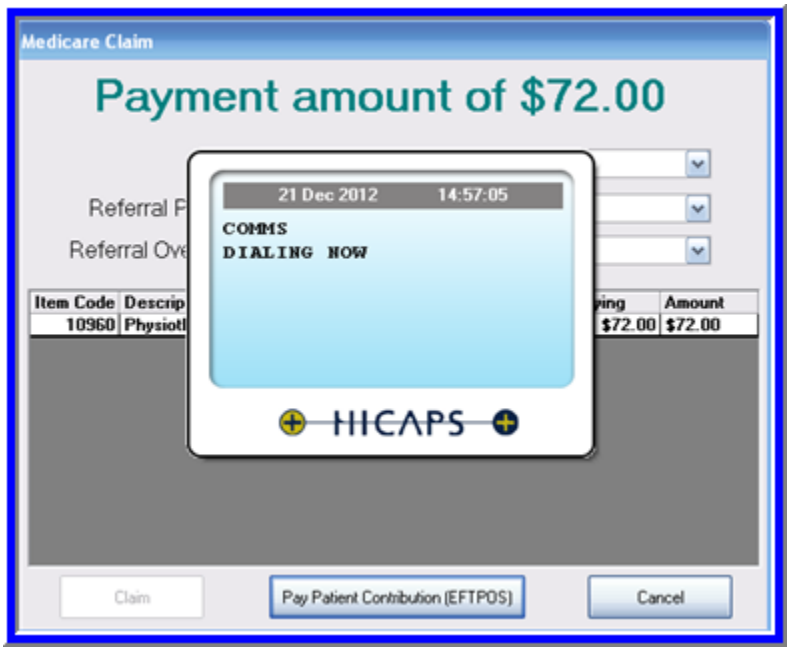
- Follow the prompts on the screen.



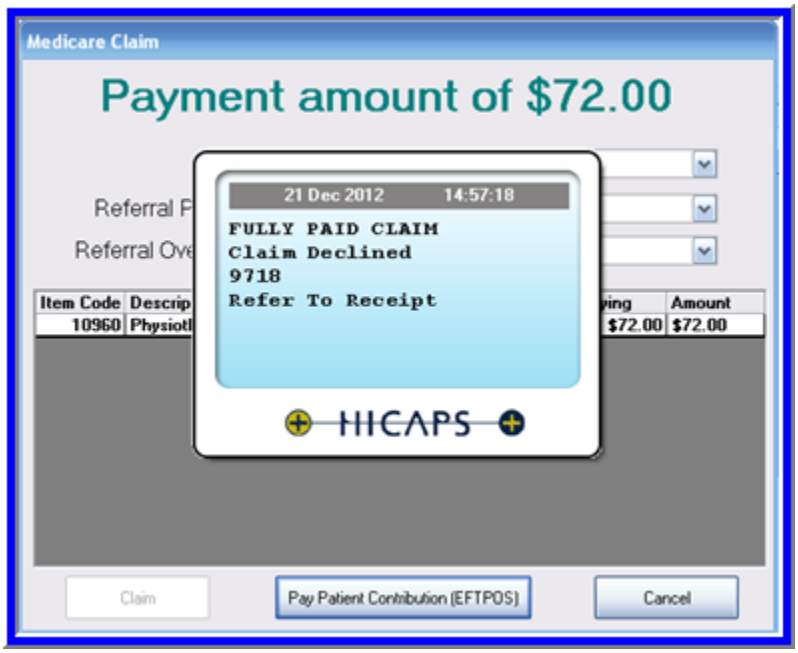
- Follow the prompts on the screen.



- If the Medicare Number is not filled out in the Patient Details screen, you will be prompted to swipe the card.



- Follow the prompts to complete the transaction



- Once the claim has been processed you will be advised of the outcome of the claim

**for testing purposed this screen shot has been included.

4 WorkCover Queensland - Version 9 and above of PPMP®

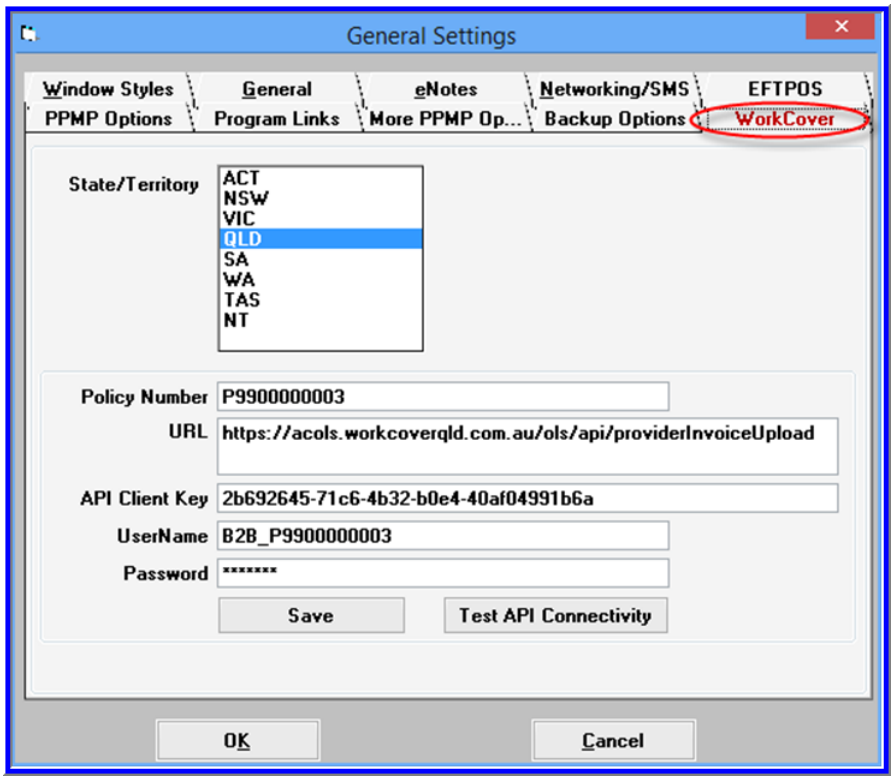
4.1 Step 1 - Register with Queensland WorkCover

- It is a simple set up process—just send an email to providers.providers@workcoverqld.com.au (include reference to 'B2B' in the subject line) to obtain a B2B username/password which you will need add into PPMP® (step 3).
- Once you receive the information, please enter it in the PPMP® setup or contact PPMP® to arrange a setup time & training.

4.2 Step 2 – Enter registration details into PPMP®

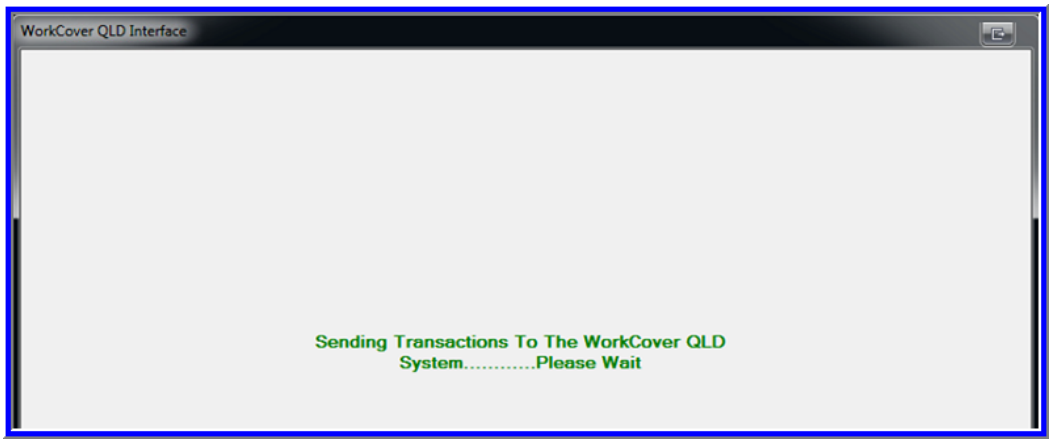
On the Main Screen of PPMP®

- Select Setup
- Select Computer Resource Usage
- Select the WorkCover tab to enter the appropriate information.

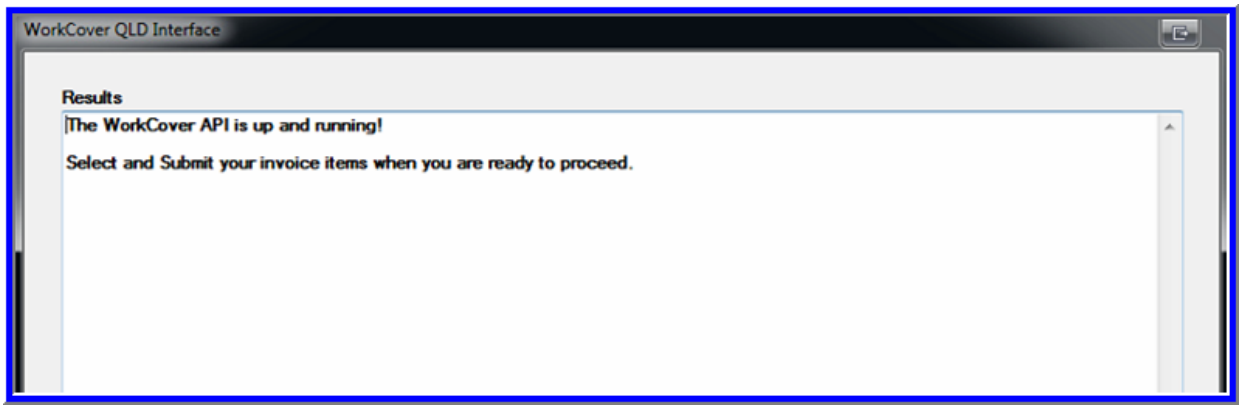


State/Territory: QLD
Policy Number: WorkCover Queensland Supplied
URL: PPMP® Supplied
API Client Key: PPMP® Supplied
User Name: WorkCover Queensland Supplied
Password: WorkCover Queensland Supplied

- Save the configuration & then press Test API Connectivity



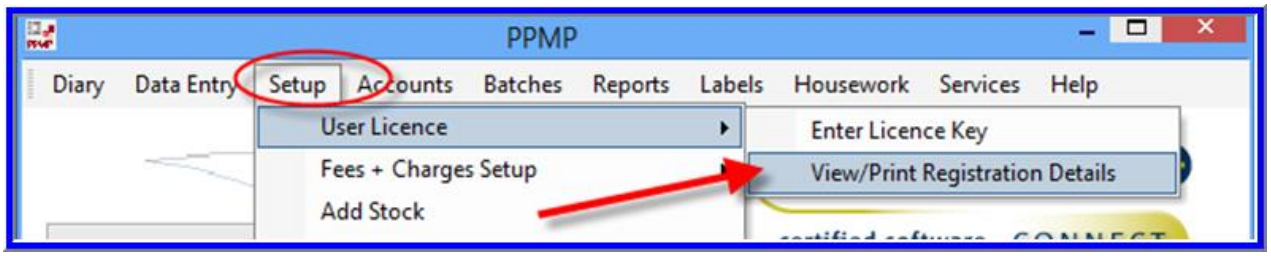
- Please wait while the system initiates a test.


WorkCover QLD Interface
Results
The WorkCover API is up and running!
Select and Submit your invoice items when you are ready to proceed.

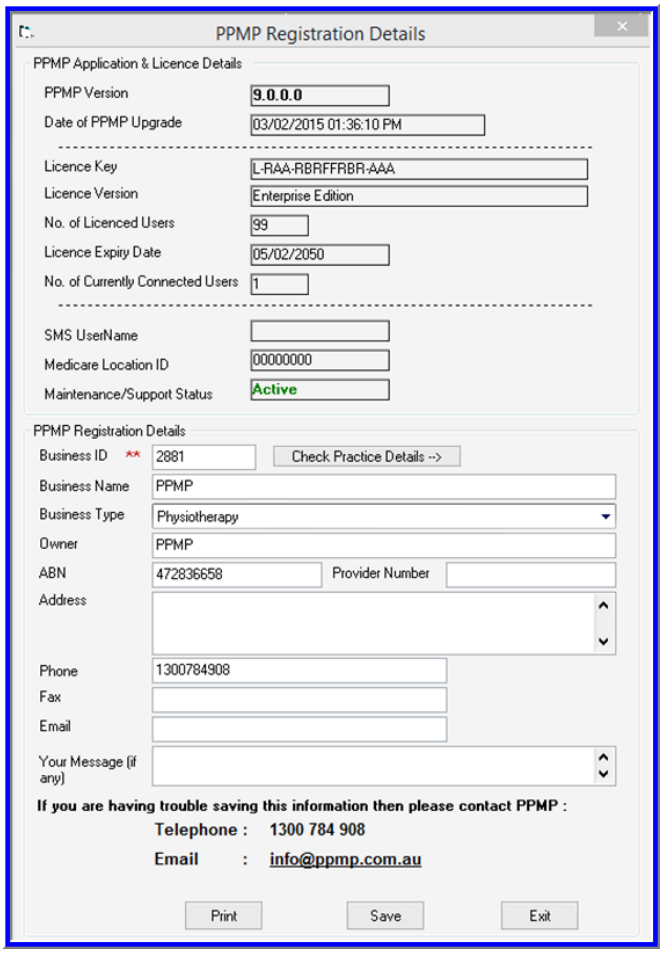
- The follow screen is displayed if successful. Press ok
- If you plan to lodge on more than one terminal, please repeat Step 2 only & install all three certificates.
- If you experience an error, please contact PPMP® Support for assistance.

4.3 Step 3 - Practice registration details

On the Main Screen of PPMP®



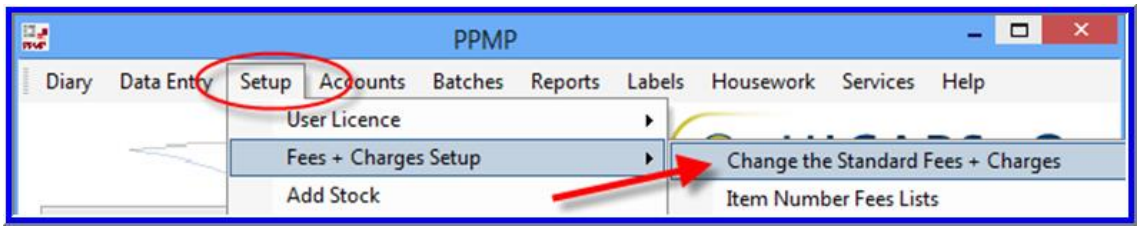
- Click Setup
- Select User License
- Select View/Print Registration Details.
- Complete the registration, including Business Name & ABN *See below*



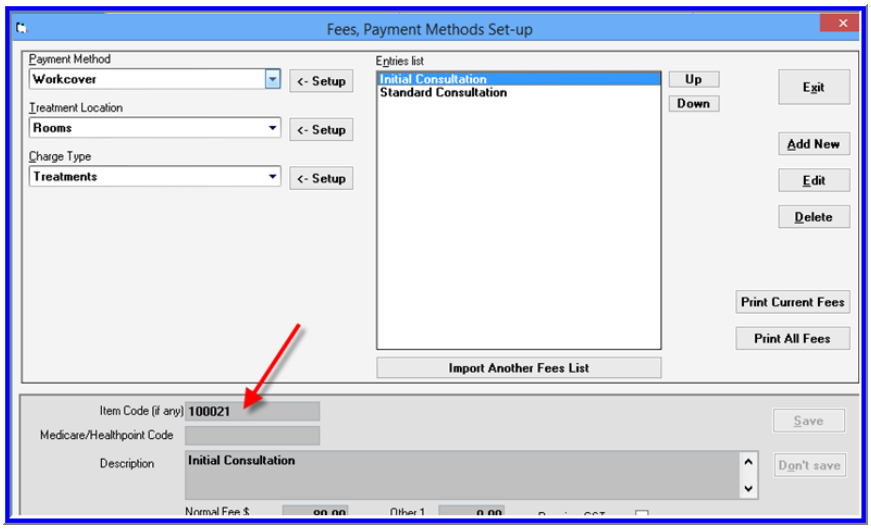
- Click Save

4.4 Step 4 - Fees & charges setup

NB: Item Codes - https://www.worksafe.qld.gov.au/service-providers/allied-health-fees
On the Main Screen of PPMP®

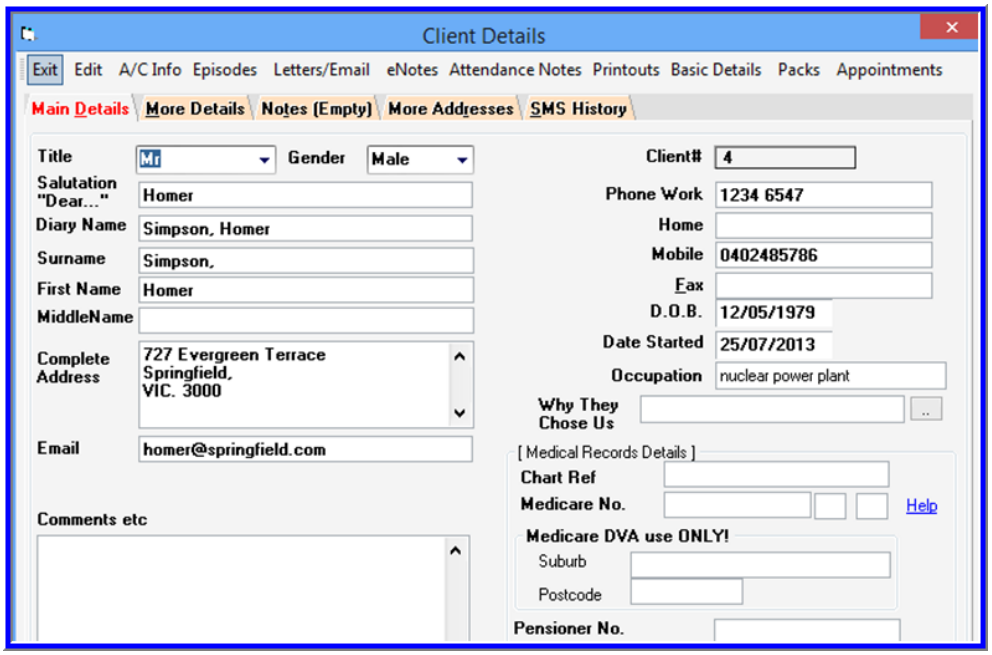


- Click Setup
- Fees & Charges Setup
- Change the Standard Fees & Charges

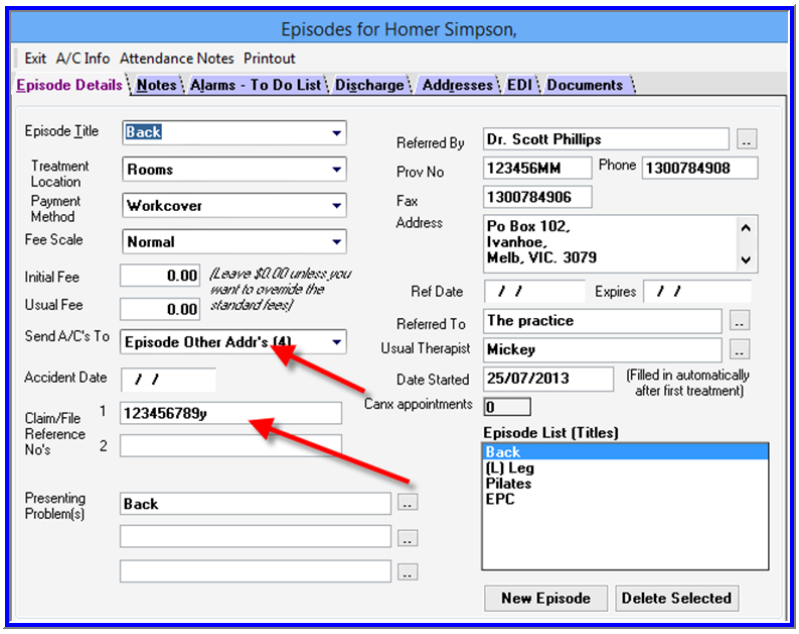


- Go to your Workcover Payment method and ensure the **Item Code** is entered for each individual charge
- Do the same for treatment locations and any other areas you have Workcover charges entered
- Click Save

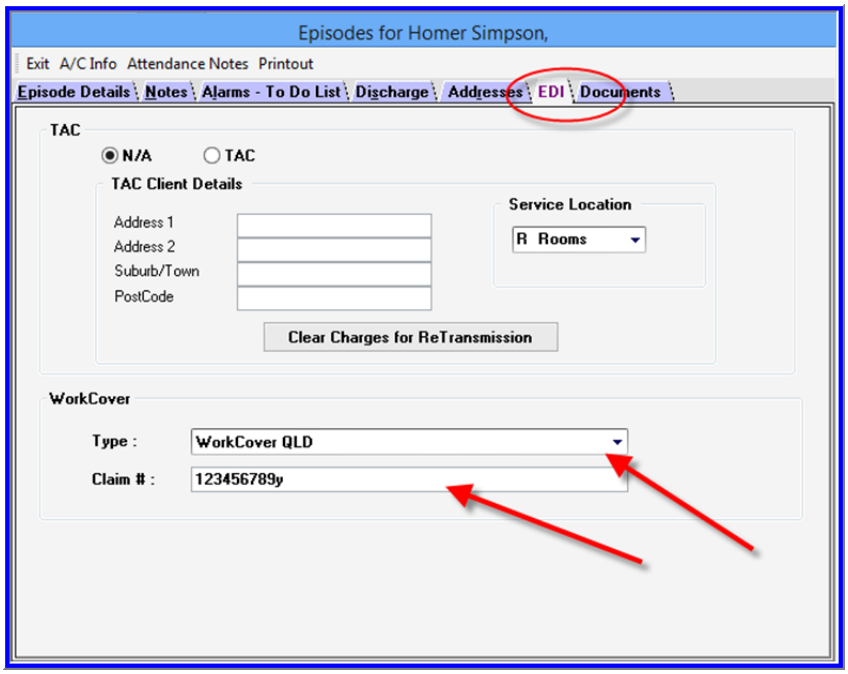
4.5 Step 5 - Client record setup / Episode setup



- Open the Client record



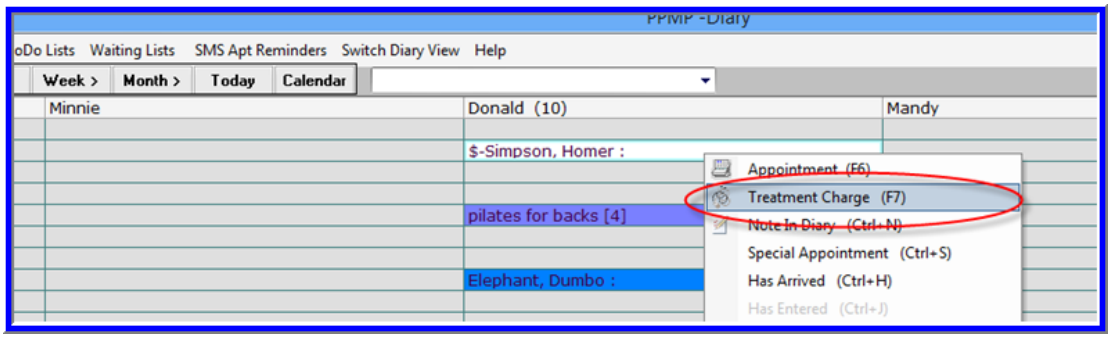
- Fill in the episode details
- Change the Send A/C's to **Episode Other Addr's (4)**
- Enter the claim number in Claim/File Reference No's 1



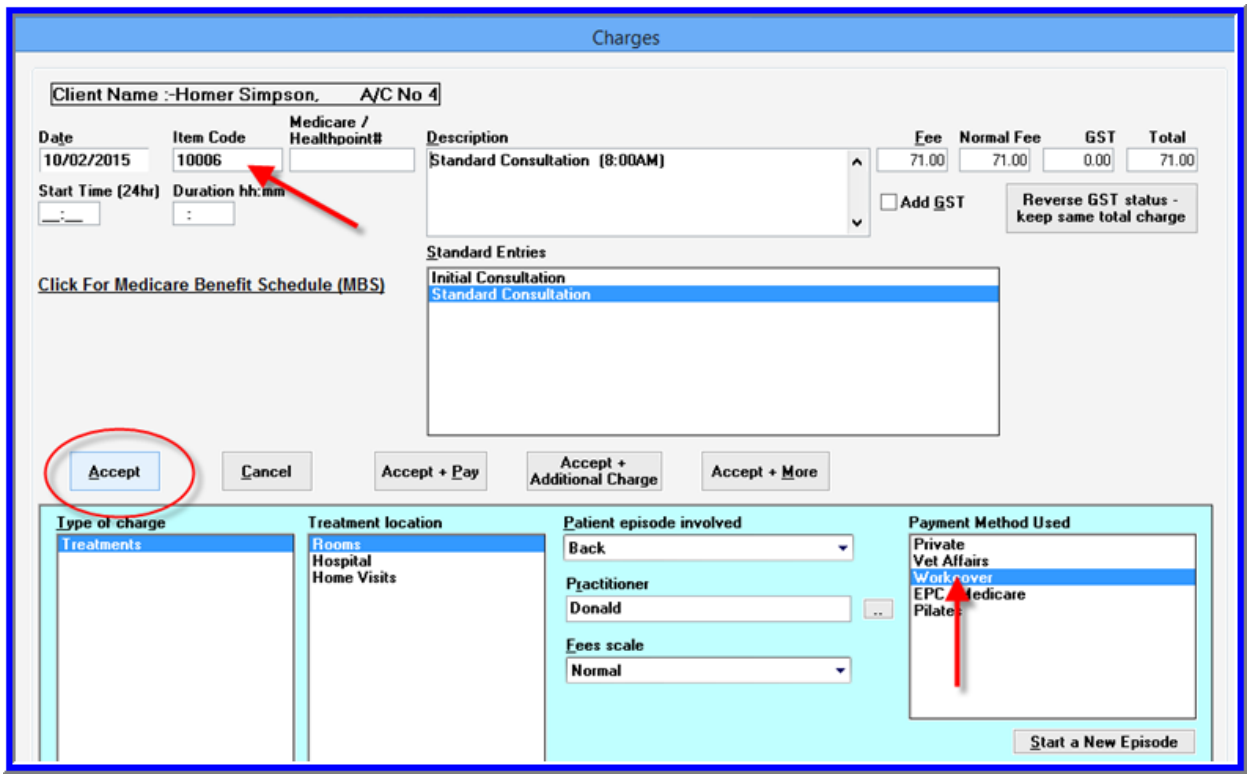
- Click the EDI Tab
- For **Type** Select WorkCover QLD
- Enter the Claim number
- Click exit
- Save the changes

4.6 Billing a patient

Click HERE to watch videook



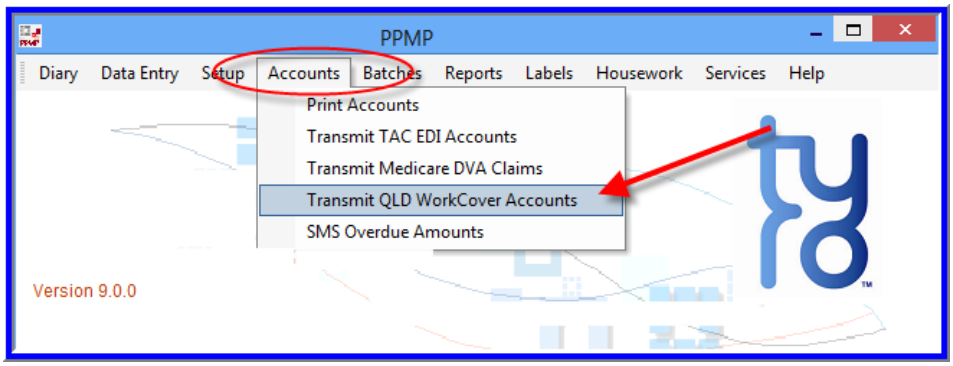
- Select the Client on the Diary
- Click Actions
- Select Treatment charge



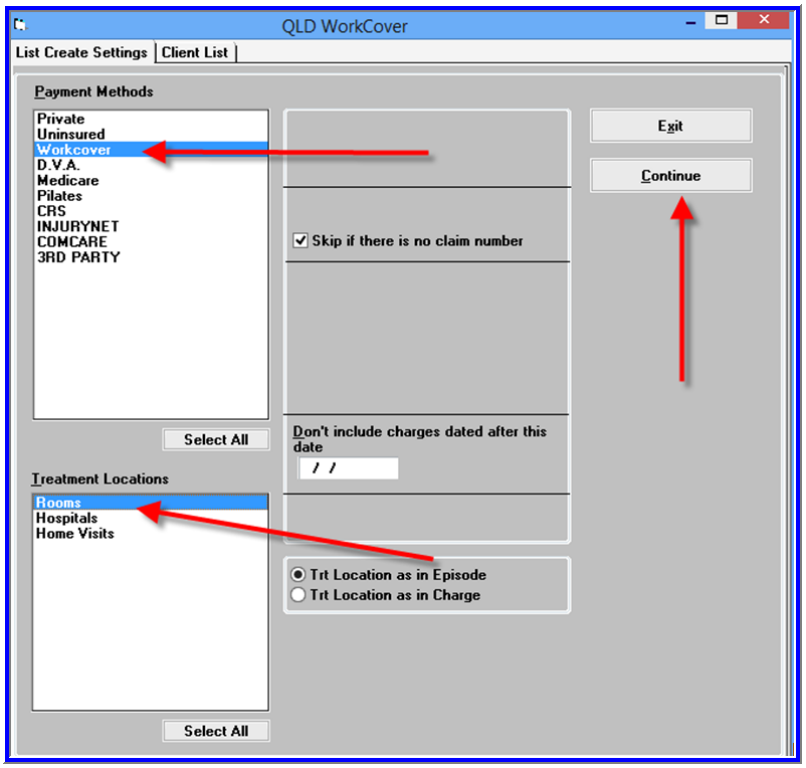
- Select the correct charge
- Ensure all fields are correct
- Click Accept

4.7 Submitting a claim

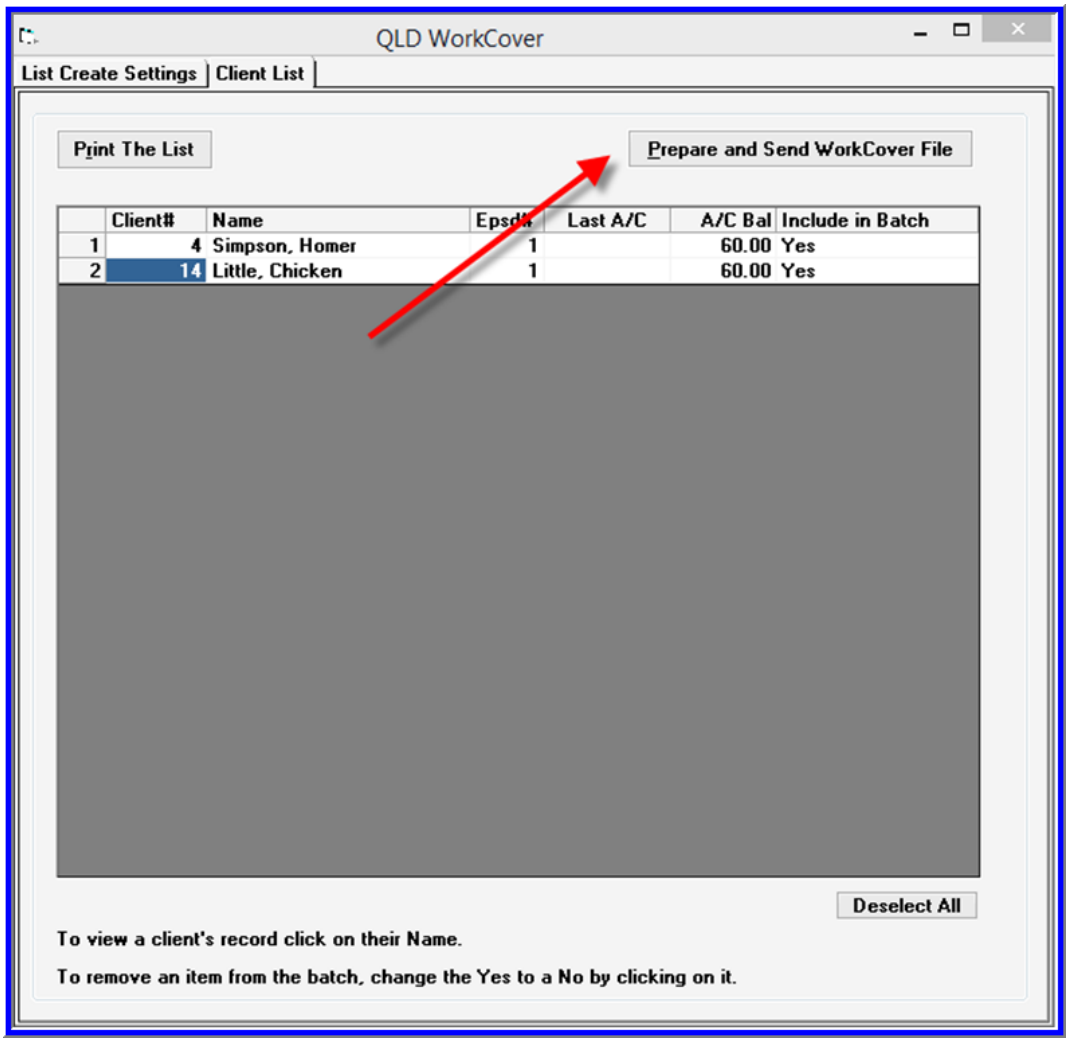
On the Main Screen of PPMP®



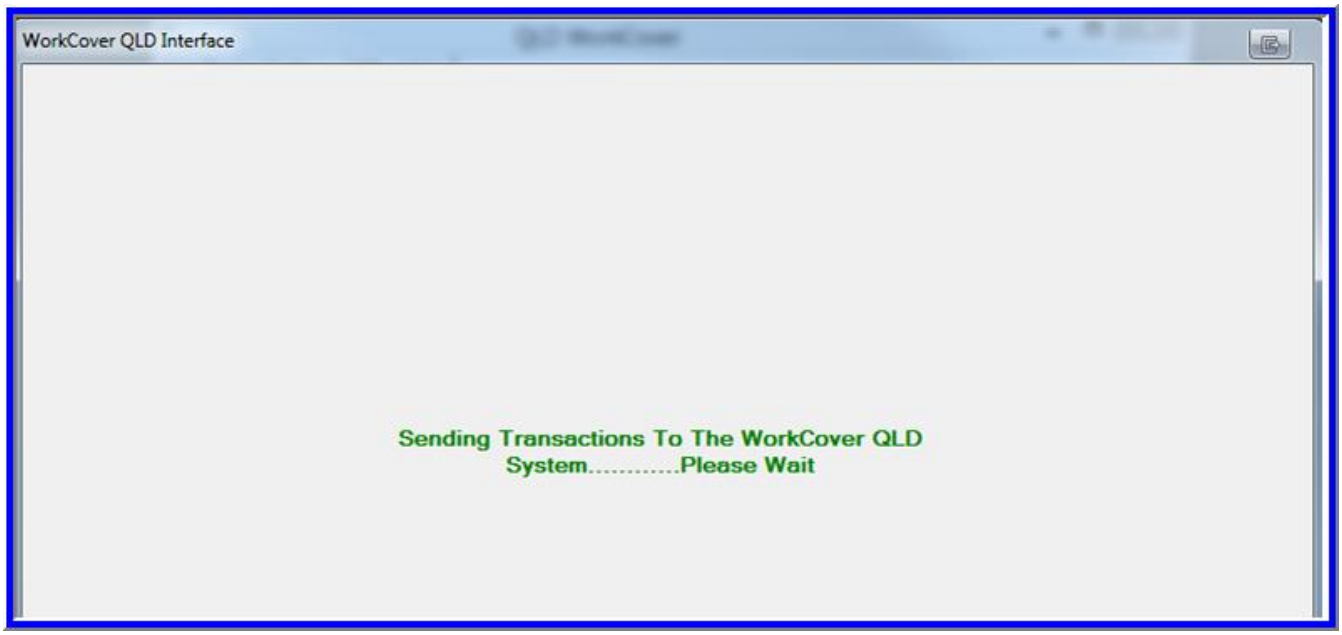
- Go to Accounts
- Transmit QLD WorkCover Accounts

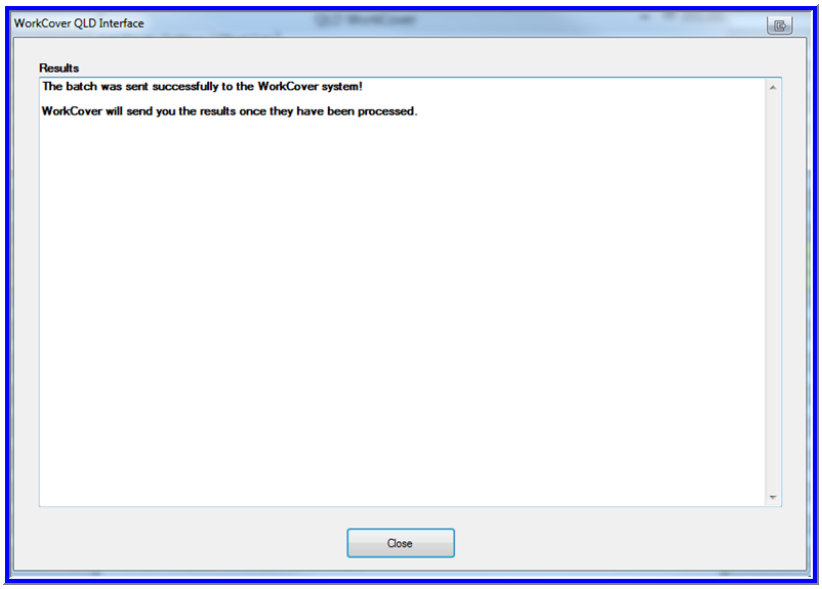


- Select all Payment Methods and Treatment Locations with WorkCover charges
- Click Continue


QLD WorkCover
List Create Settings
Client List
Print The List
Prepare and Send WorkCover File
Client#
Name
Epsd#
Last A/C
A/C Bal
Include in Batch
1 4 Simpson, Homer 1 60.00 Yes
2 14 Little, Chicken 1 60.00 Yes
Deselect All
To view a client's record click on their Name.
To remove an item from the batch, change the Yes to a No by clicking on it.

- Click Prepare and Send WorkCover File once the list has been created

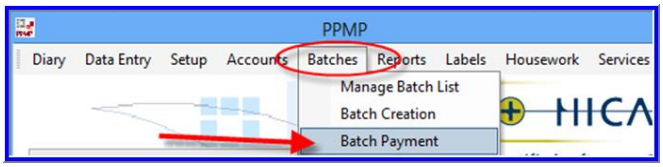



WorkCover QLD Interface
Results
The batch was sent successfully to the WorkCover system!
WorkCover will send you the results once they have been processed.
Close

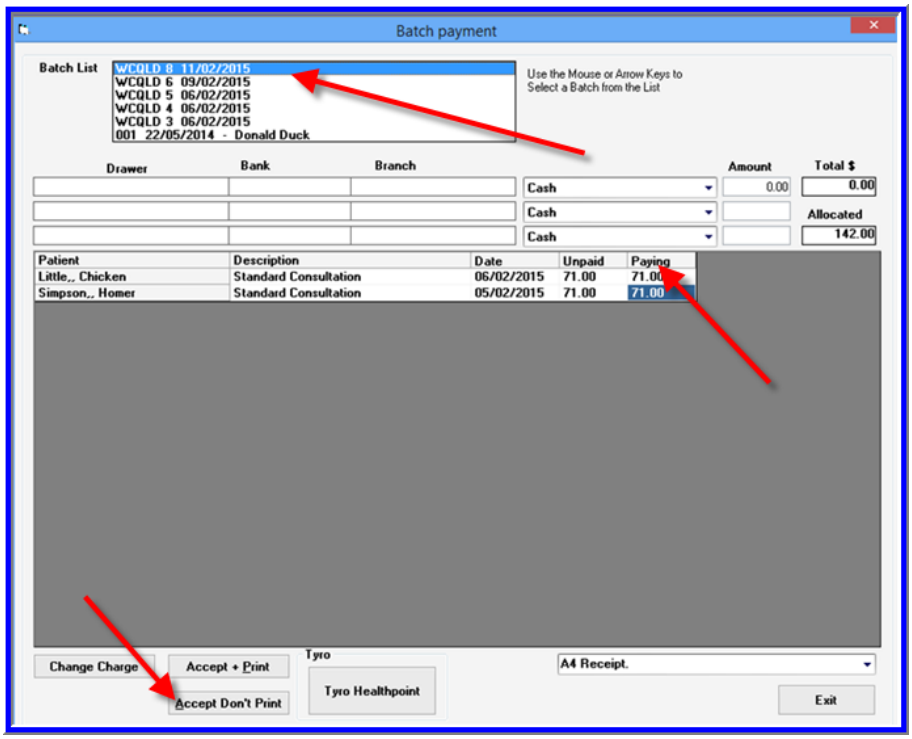
- Once transactions have been submitted the results screen appear confirming successful transmission

4.8 Recording a payment

On the Main Screen of PPMP®



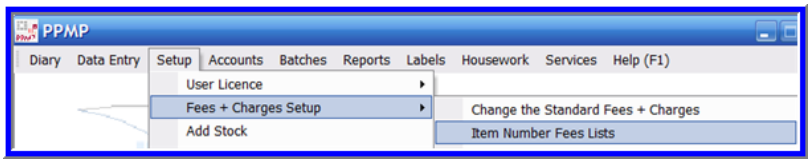
- Select Batches
- Select Batch Payment



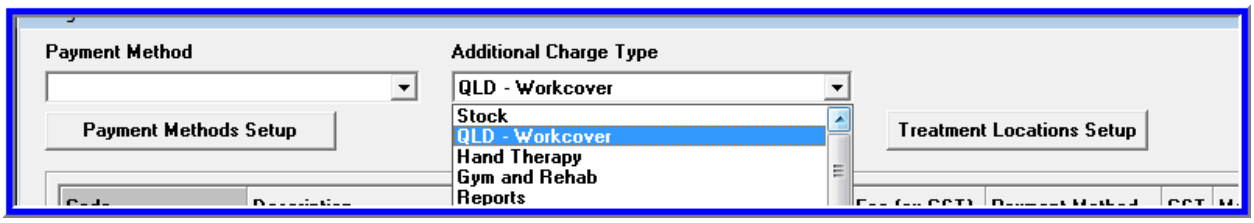
- Select the Batch you wish to pay
- Allocate the payments that you have been advised of
- Click Accept Don't Print

4.9 Additional fees & charges – setup and use

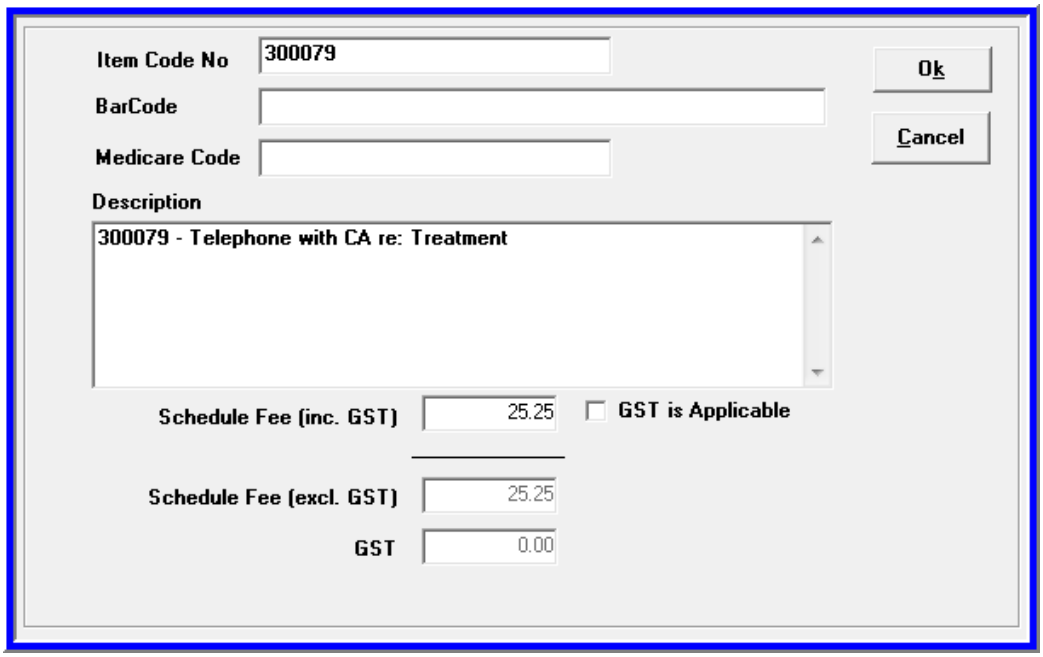
Main Menu PPMP®



- Click Setup
- Click Fees & Charges Setup
- Click Item Number Fees List (This is where you set up your additional charges list)



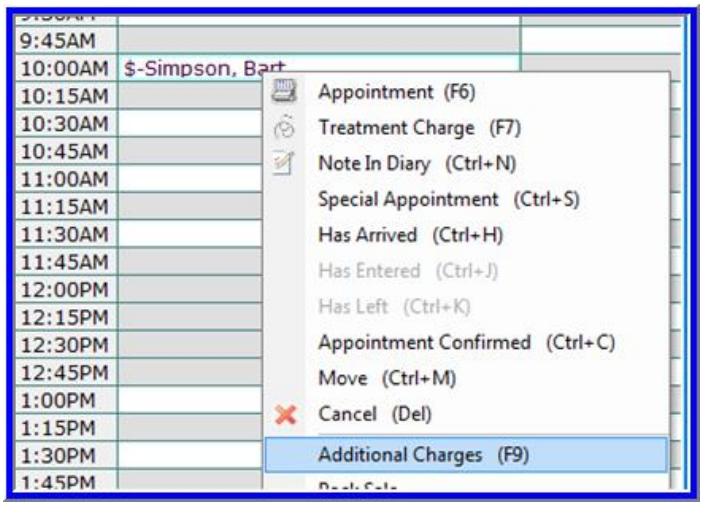
- Make sure you select the correct “Charge Type”
- Click Add a New Charge



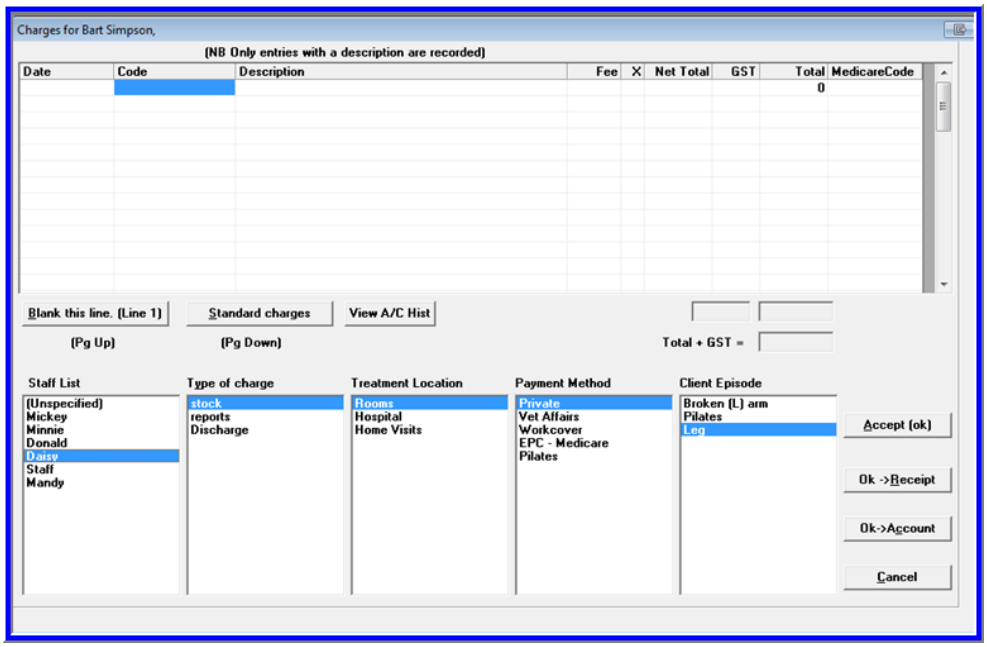
- Build your list of additional charges
- Give each stock item an Item Code No (eg. 300079)
- Enter a generic comment matching the code such as 300079 - *Telephone with CA re: Treatment*
- Enter the Schedule Fee (inc. GST)
- Tick the GST box if you want this item to automatically have GST added each time that it is used.
- You can add stock in, and as you use this item to sell stock it will reduce the level on hand.

To add an addition charge to a client file
From the diary page of PPMP®

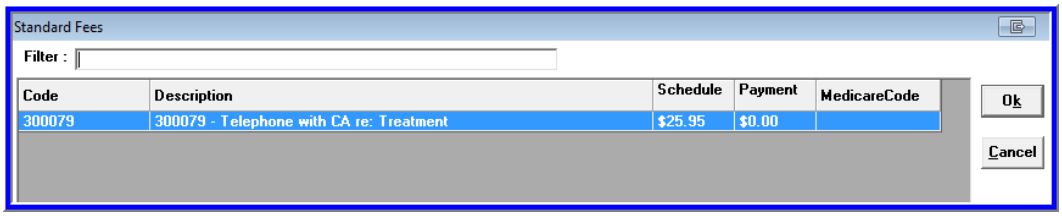
- Select the client



- Click **Actions** or **Right Click** on client's name
- Select **Additional Charges**



- If you are charging for an item that has already been entered into the system -> Click **Standard Charges** otherwise you can enter the charge straight into the fields provided



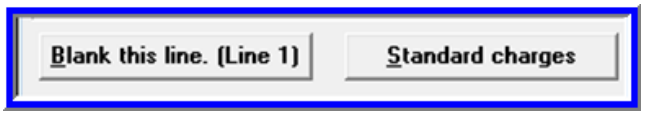
The list offered will be the one for the charge type selected in the Type of Charge List

- Select the entry you want
- Click **Ok**

OR

- Type in a charge directly on the charge window
-

If you make a mistake



- Click **Blank this Line** (the whole line will be deleted)

When you have entered all the entries you want select one of the four options

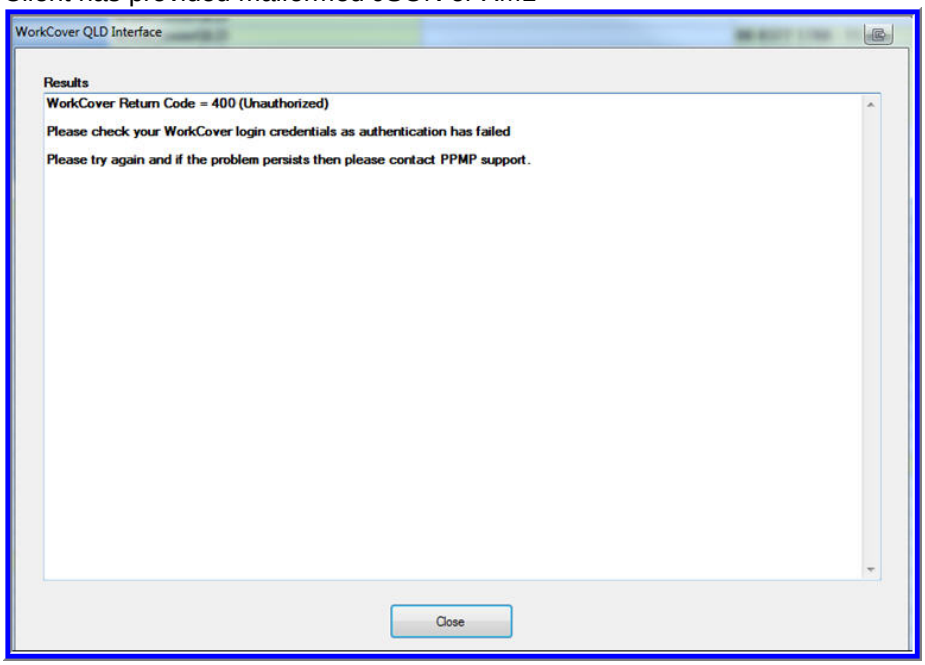
- Clicking **Accept (ok)** button (saves and closes)
- Clicking **Ok-> Receipt** – saves the charge then goes to the payment window
- Clicking **Ok-> Account** - Saves it then prints an account
- Clicking **Cancel** – will cancel the charge and not add to the client account

4.10 WorkCover Queensland return and error handling codes

The PPMP Workcover QLD module will show the following errors. See below for a brief description & trouble shooting.

4.11 Workcover Return Code (400)

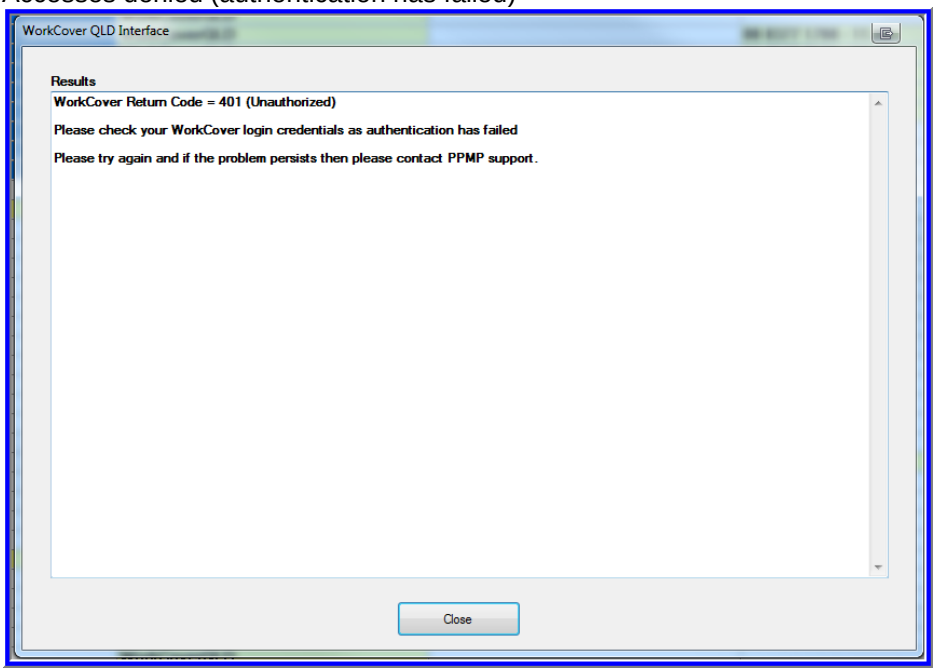
Client has provided malformed JSON or XML


WorkCover QLD Interface
Results
WorkCover Return Code = 400 (Unauthorized)
Please check your WorkCover login credentials as authentication has failed
Please try again and if the problem persists then please contact PPMP support.
Close

Please verify all information you are transmitting is correct. If the return code still exists, please contact PPMP Support.

4.12 Workcover Return Code (401)

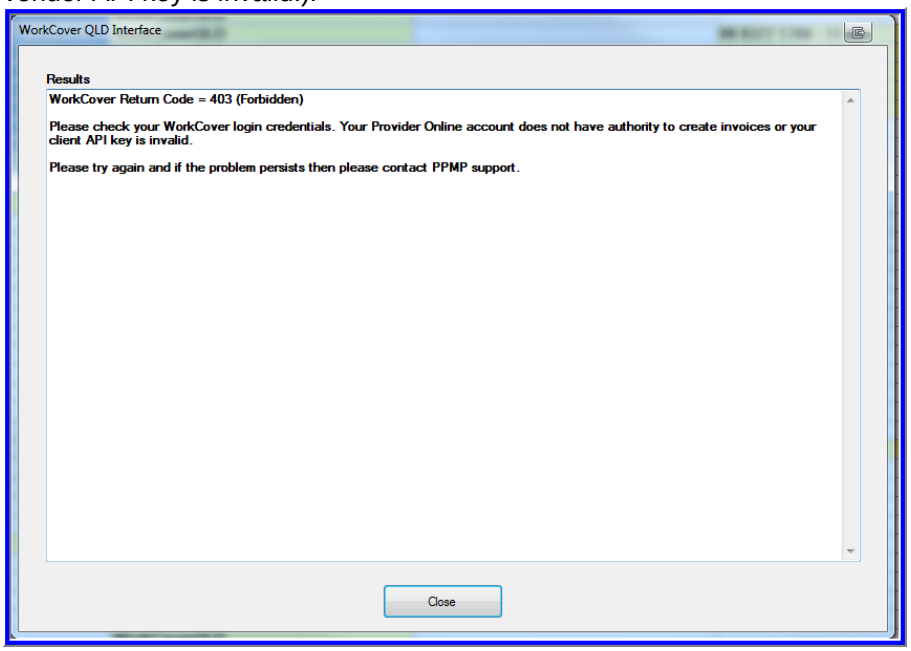
Accesses denied (authentication has failed)


WorkCover QLD Interface
Results
WorkCover Return Code = 401 (Unauthorized)
Please check your WorkCover login credentials as authentication has failed
Please try again and if the problem persists then please contact PPMP support.
Close

Please verify all setup is correct & login information was entered correctly. Check with Workcover QLD that you have registered correctly. If the return code still exists, please contact PPMP Support.

4.13 Workcover Return Code (403)

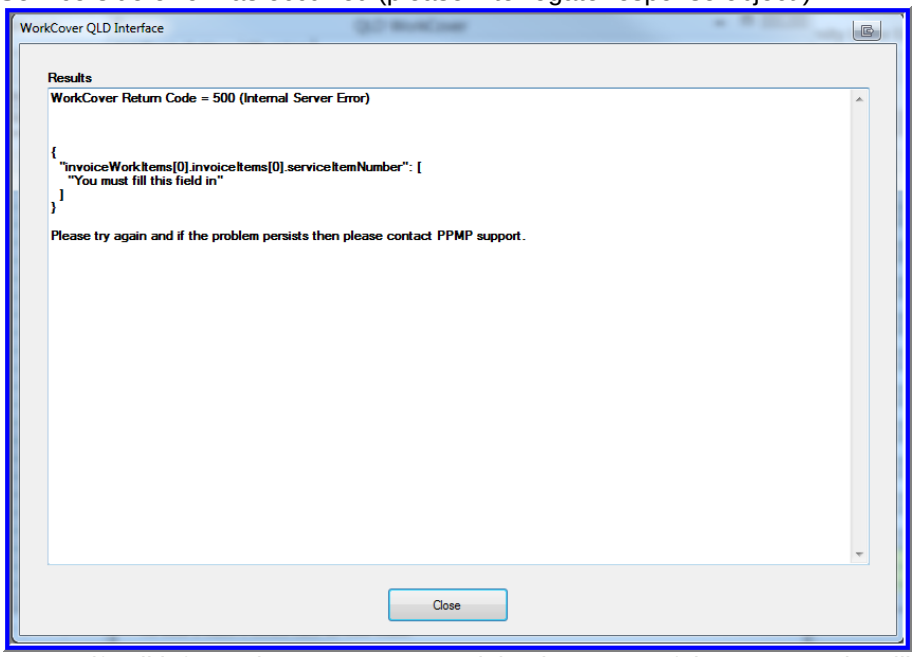
Accesses denied (authentication has failed – your Provider Online account does not have authority to create invoices, or the vendor API key is invalid.).


WorkCover QLD Interface
Results
WorkCover Return Code = 403 (Forbidden)
Please check your WorkCover login credentials. Your Provider Online account does not have authority to create invoices or your client API key is invalid.
Please try again and if the problem persists then please contact PPMP support.
Close

Please verify all setup is correct & login information was entered correctly. Check with Workcover QLD that you have registered correctly. If the return code still exists, please contact PPMP Support.

4.14 Workcover Return Code (500)

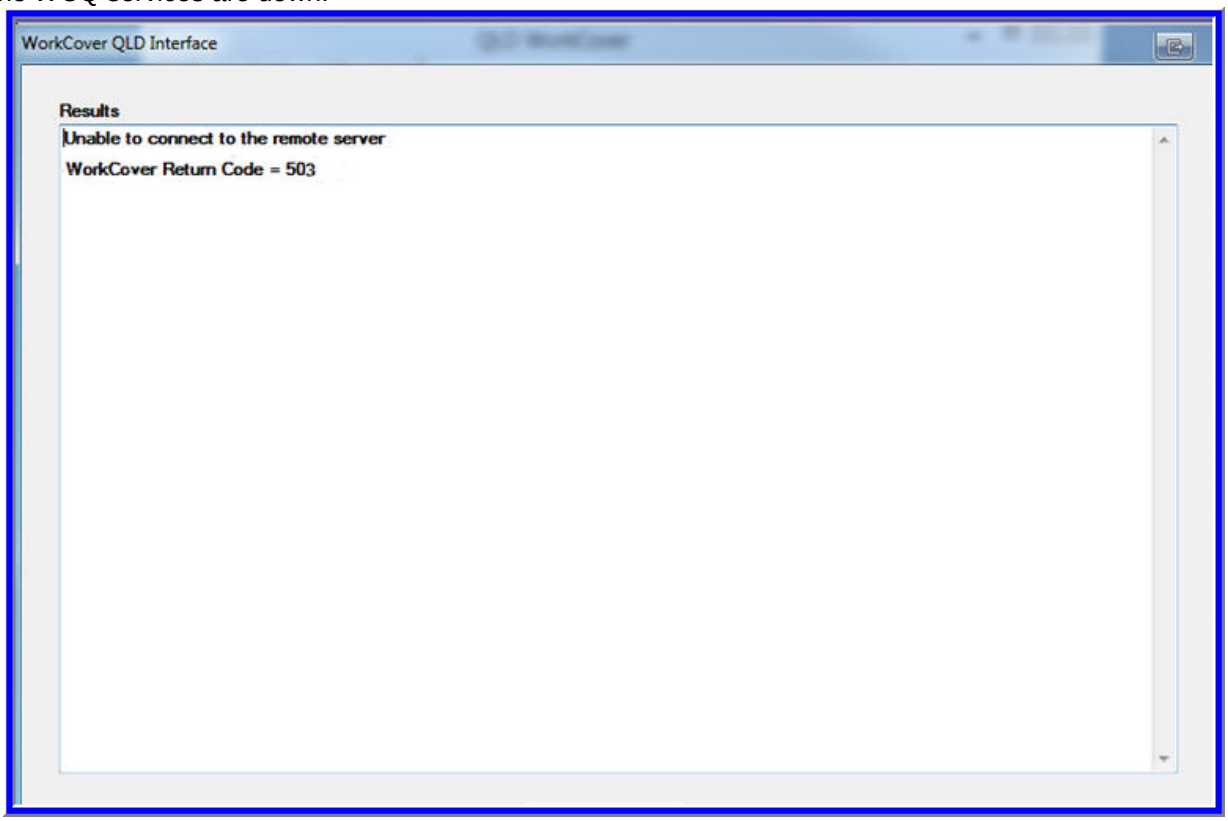
A Service-side error has occurred (please interrogate response object.).



Please verify all information you are transmitting is correct. If the return code still exists, please contact PPMP Support.

4.15 Workcover Return Code (503)

The WCQ services are down.



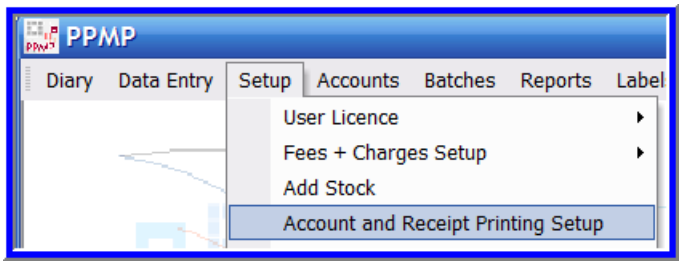
Please verify your workstation is connected to the internet & a firewall is not blocking PPMP access. Check with Workcover QLD that the service is available. If the return code still exists, please contact PPMP Support.

Section 3 – PPMP® user manual

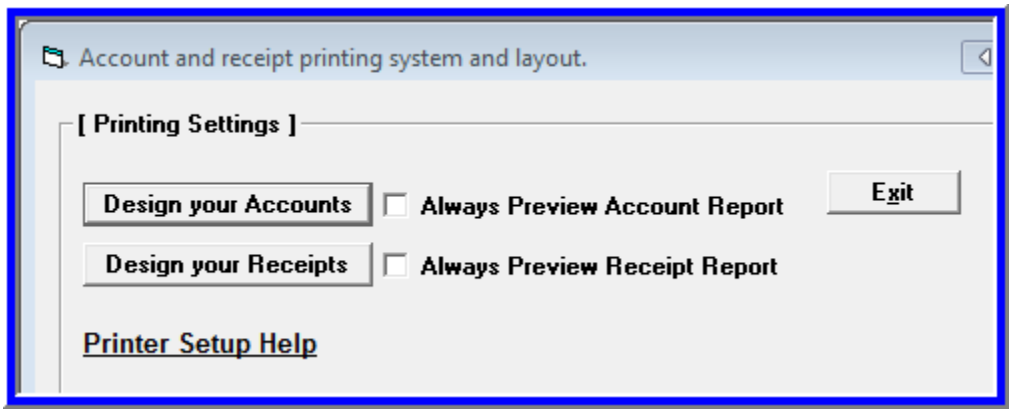
5 Account and receipt Design

The program comes with pre-loaded designs for both A4 and A5 paper sizes.
To personalise you accounts and receipts for your own clinic

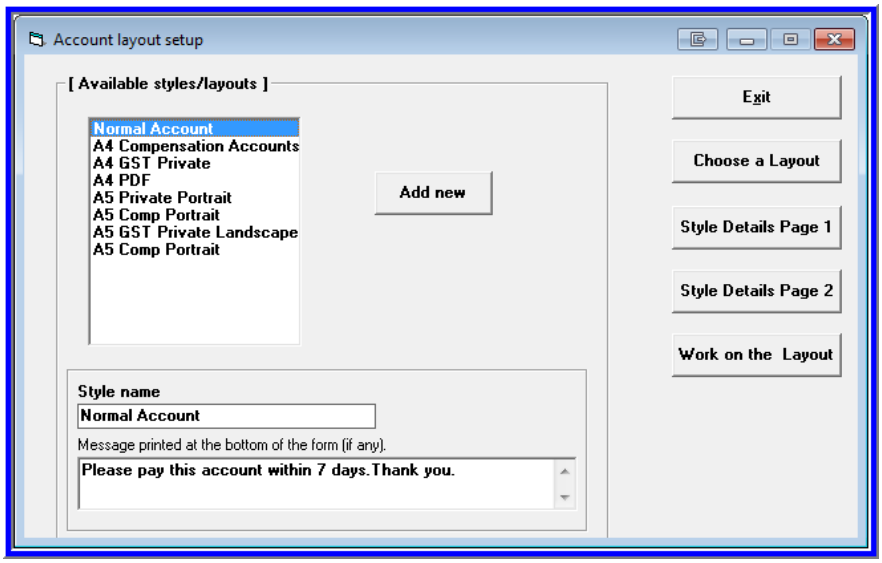
- Go to the main menu for PPMP

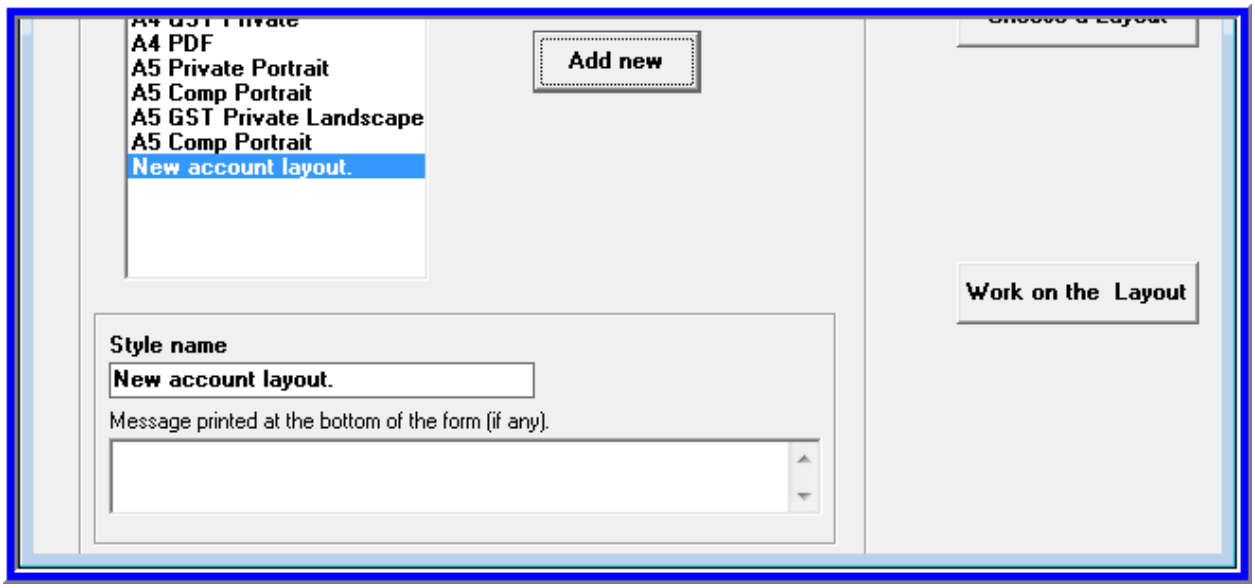


- Click on Setup
- Account and Receipt Printing Setup

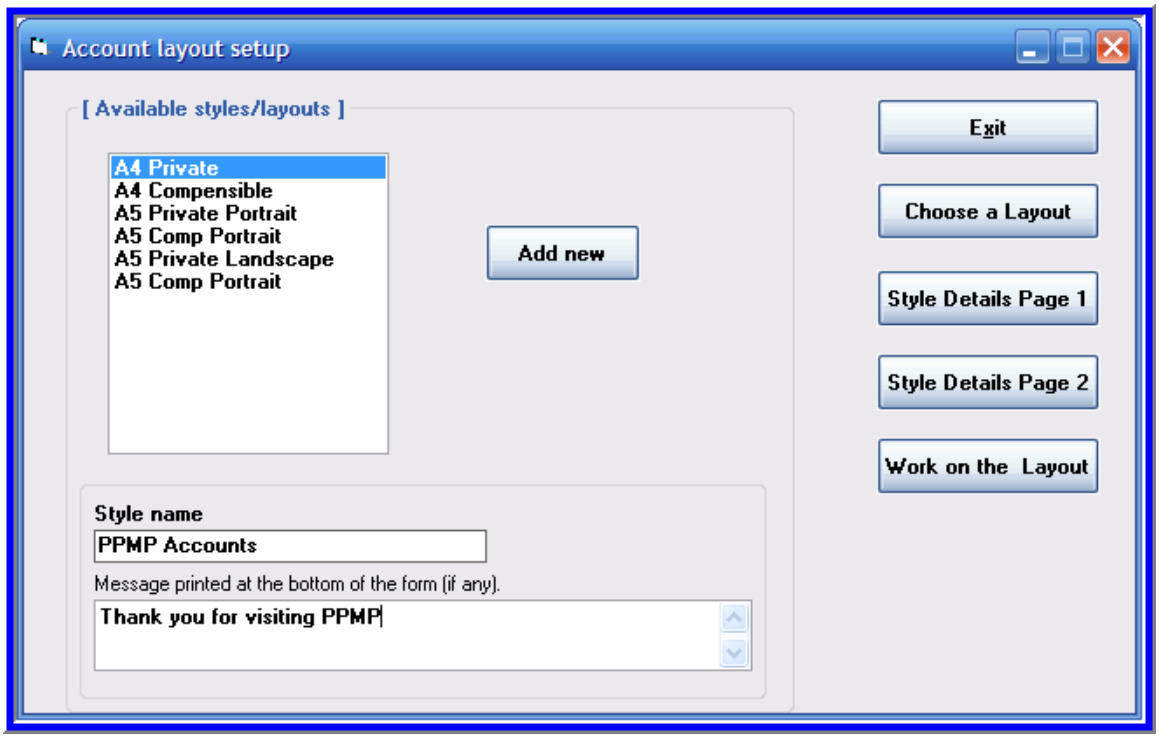


- Click on 'Design your Accounts or Design your Receipts'

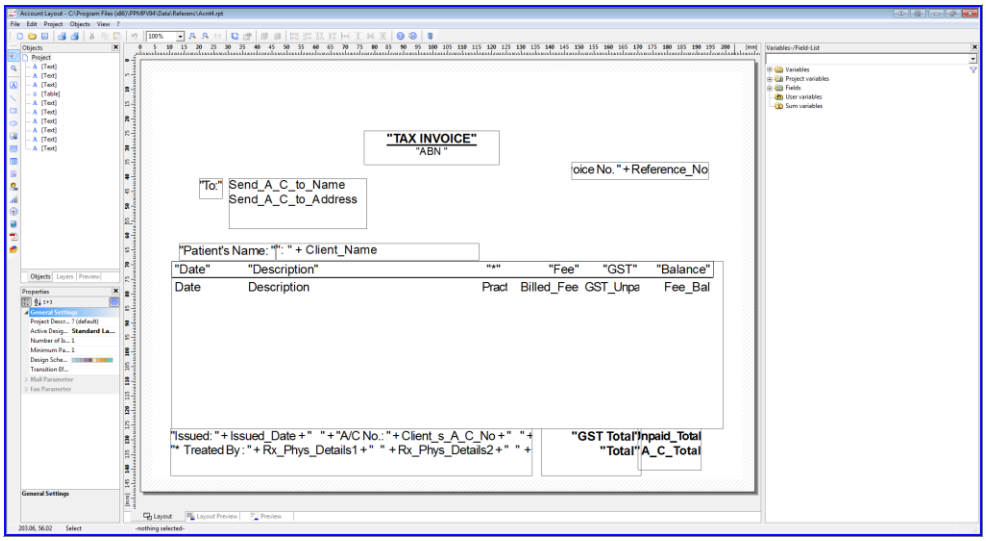




- Or select a design from the list
- You can rename your account here by typing over it in “style name”
- You can also add a message to the bottom



- When your happy with your selection click work on the layout

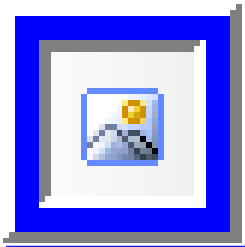

"TAX INVOICE"
"ABN "
oice No. " + Reference_No
"To:"
Send_A_C_to_Name
Send_A_C_to_Address
"Patient's Name: " + Client_Name
"Date" "Description" "*" "Fee" "GST" "Balance"
Date Description Pract Billed_Fee GST_Unpa Fee_Bal
"Issued: " + Issued_Date + " " + "A/C No.: " + Client_s_A_C_No + " " +
"* Treated By : " + Rx_Phys_Details1 + " " + Rx_Phys_Details2 + " " +
"GST Total" Unpaid_Total
"Total" A_C_Total

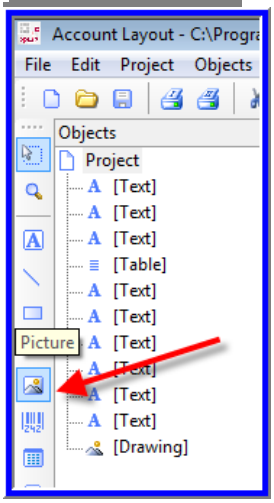
- The layout has pre-set information you can leave as it is if you are printing directly onto your Clinic letterhead
  OR
- You can insert your own Clinic information and print onto plain paper

To insert your Company Logo and other information

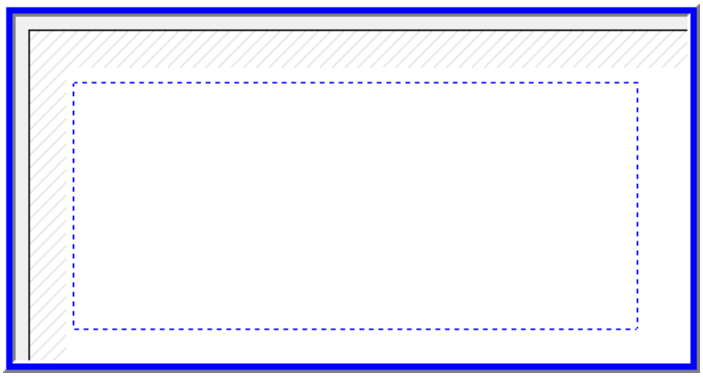
LOGOS

- Click on the Mountain/Sun Icon

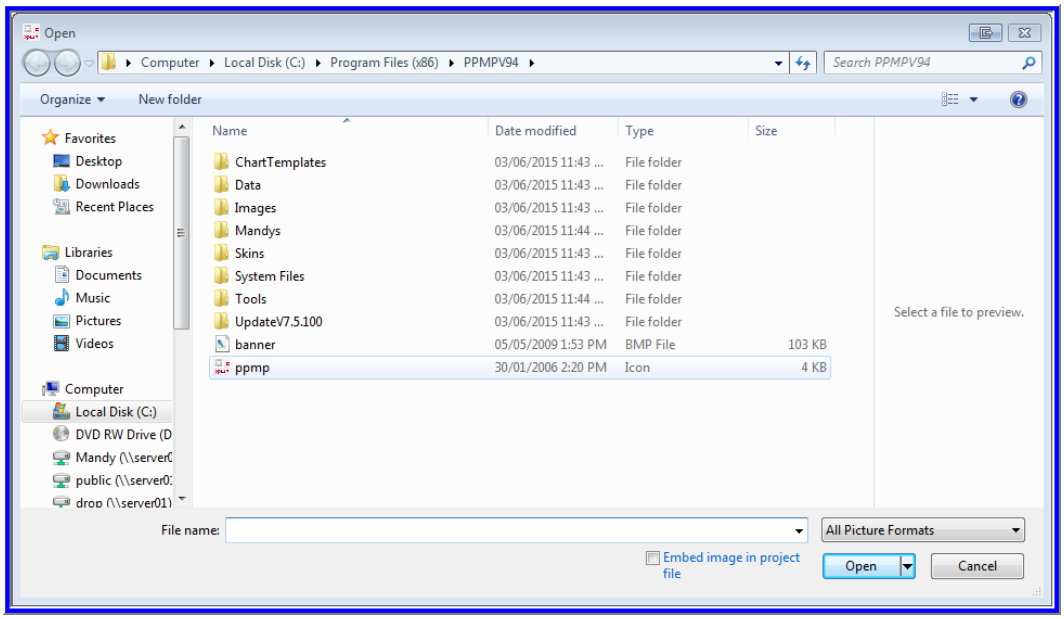




- Hold down left mouse key and draw a box (big enough for your logo)

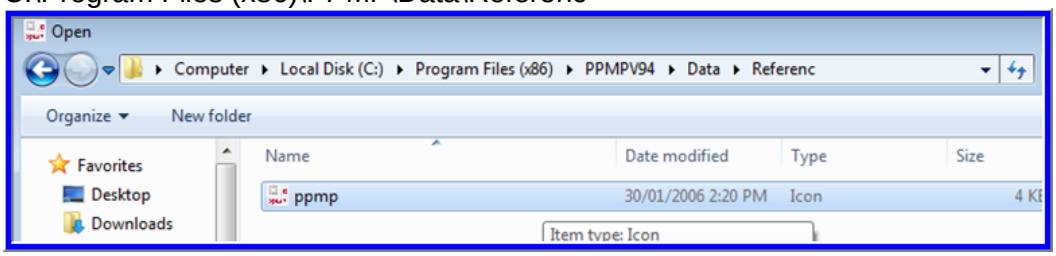


- When your box is the size you wish release the mouse button and the you will then be able to select where your logo is stored on your computer

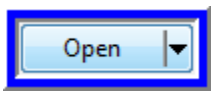


NB: PPMP recommends you save your log file into the following path on your **server** computer

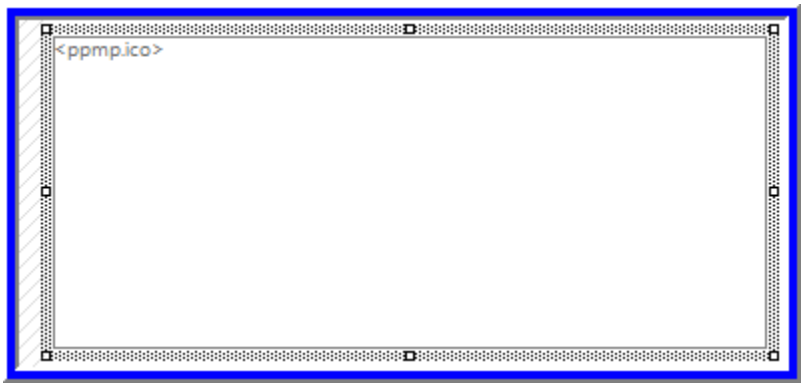
C:\Program Files (x86)\PPMP\Data\Referenc



- Select your file
- Click Open



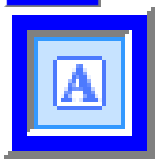
- Your layout should not show something similar to this



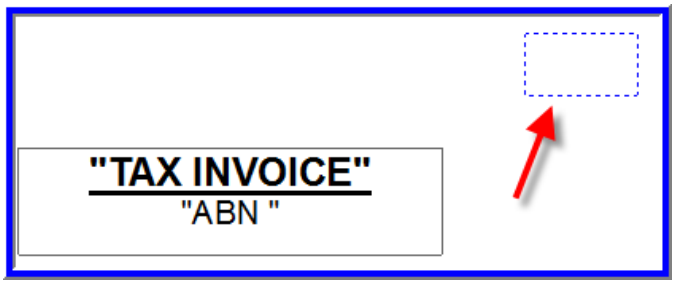
To add or edit your own information

Add Text

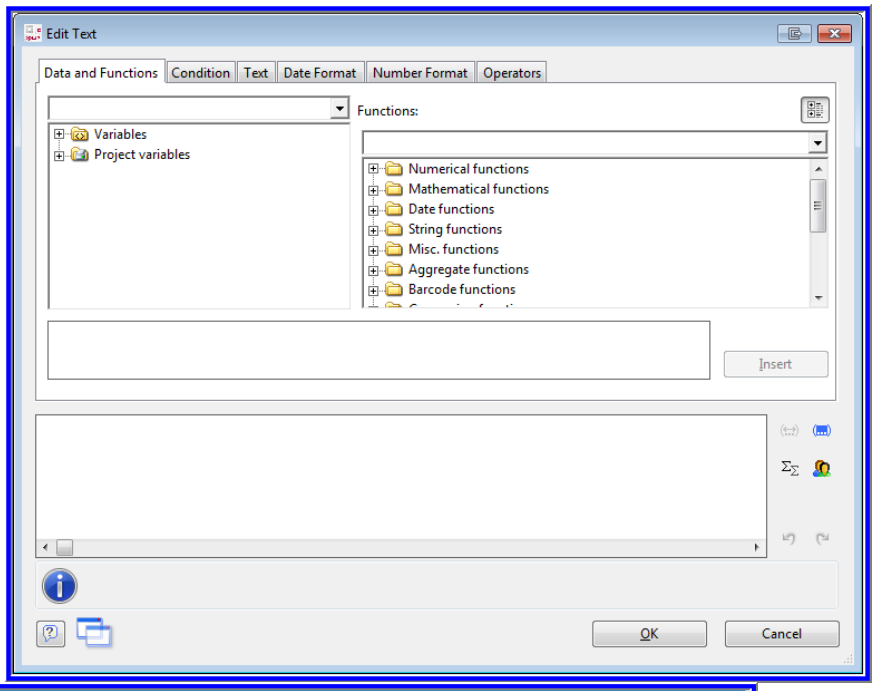
- To draw a text box - Click on the **A** button (on the left hand side)

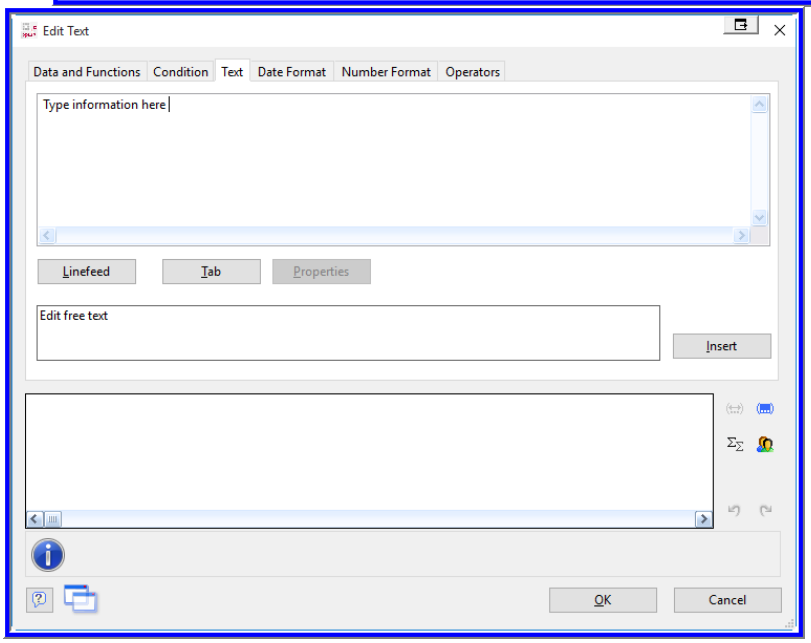


- Put your cursor on the layout
- Hold down the left mouse button and drag across and down until you have a blue box



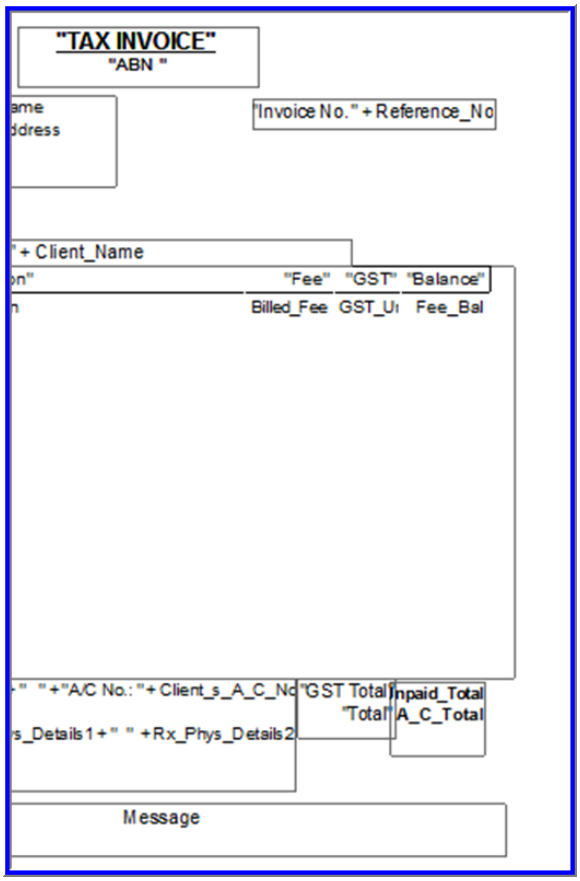
- Release the mouse and the following box will appear



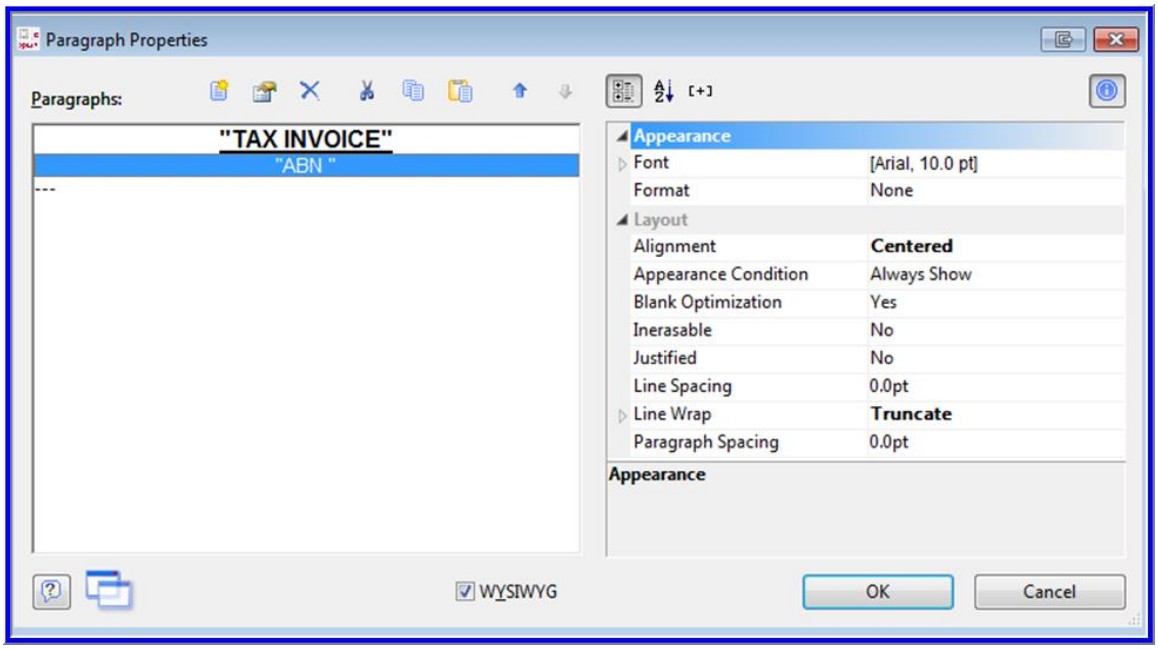


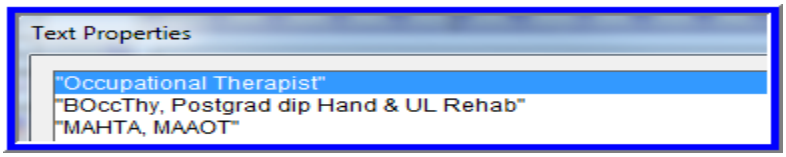
- Click on the Text Tab and type your information into the top box
- Click Insert when you have all the information typed
- Click OK

Amend Text

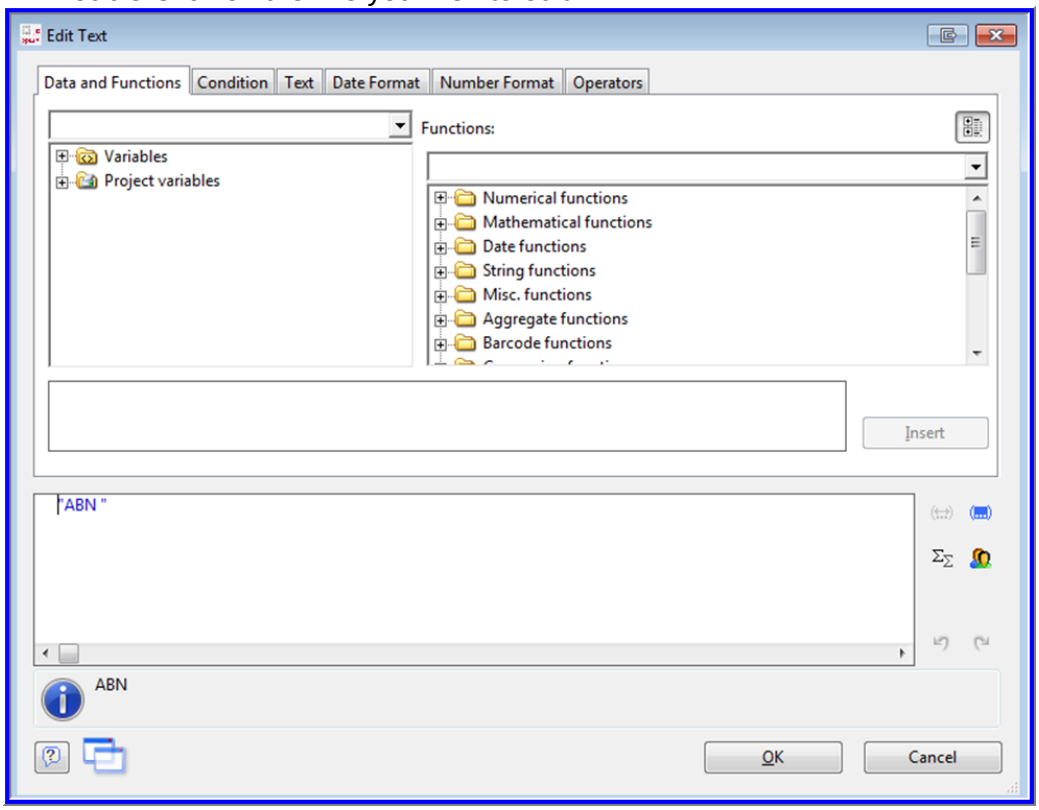


- Double click on the box you wish to edit



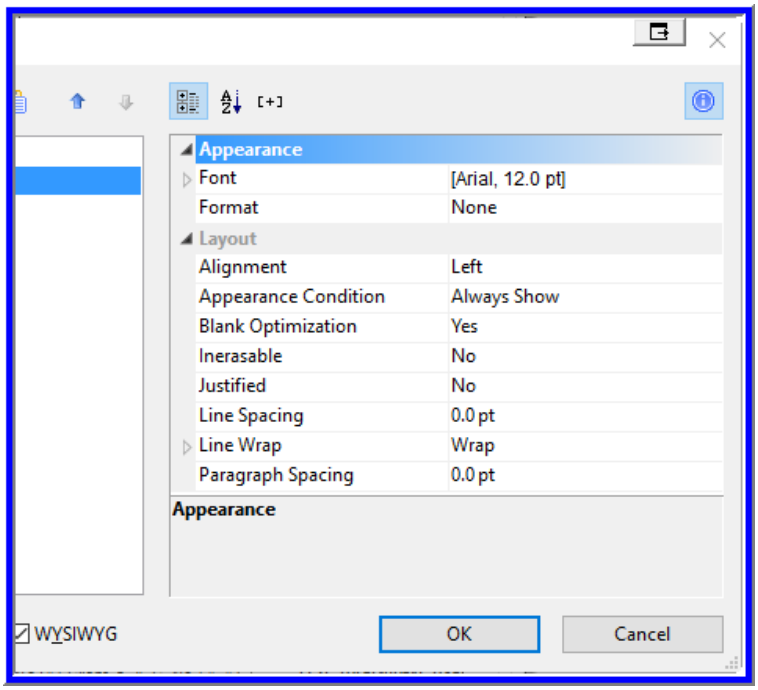


- Double Click on the line you wish to edit



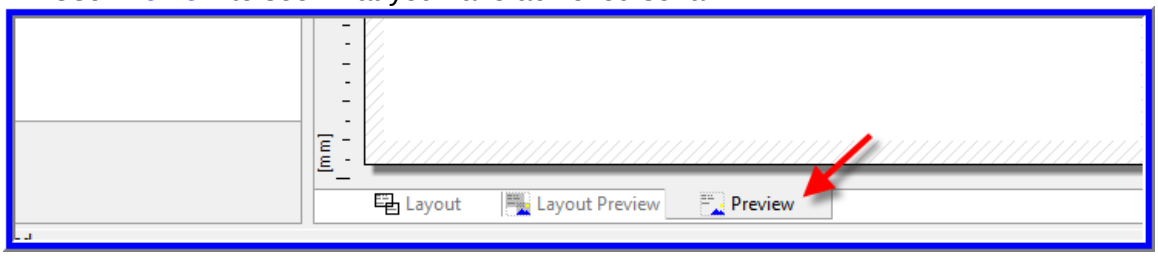
- Highlight and replace the old text with the new text
- Make sure the “Inverted Commas” are are both ends of the text and the Expression is Correct
- Click OK – Select the next line and repeat the steps until all text is correct then click OK

Properties



- Double click on any line
- From here you can alignment text to left, right or centre. Use “Line Wrap” for word wrapping and also change the font style and size

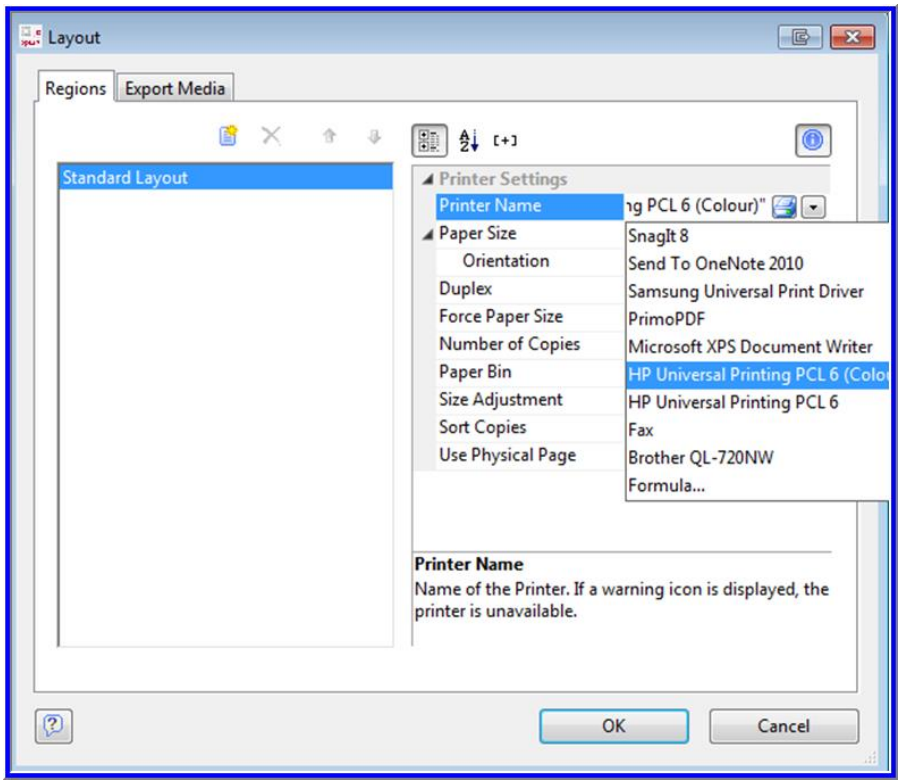
- Use **Preview** to see what you have achieved so far.



- As you adjust settings you will be able to see what effect they are having, by clicking on **Preview**

Page and Printer Setup

- Click on Project
- Page Setup
- Printer Name



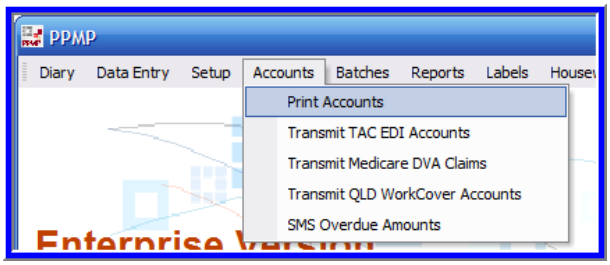
- Select your printer
- Select your paper size
- Select Portrait or Landscape
- When you have finished – **Print a Sample (File → Print Sample) –** this print out will show you exactly what your accounts will look like.

6 Account (Invoice) runs – printing, emailing and SMS'ing accounts

Account print runs are used to automate the printing of accounts for a range of patients.

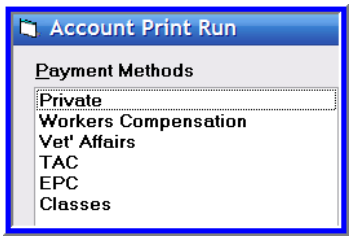
6.1 Print accounts – Stage 1

On the Main Menu PPMP®

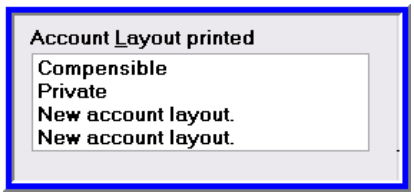


- Click Accounts
- Click Print Accounts

Supply the settings that will be used to decide who should receive an account.

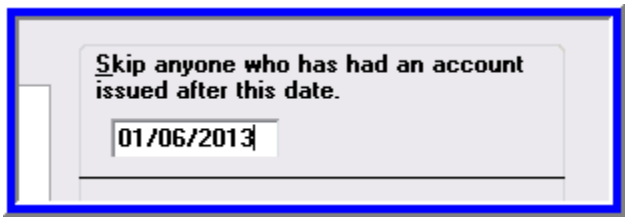


- Select the payment methods to be included in this run.



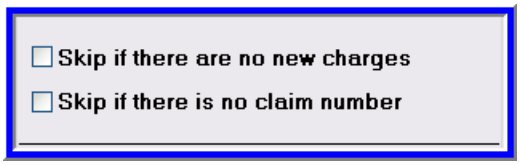
- Choose what account layout you want used.
- Only one account style can be chosen at a time

- No need to choose a Treatment Location (all will be included)



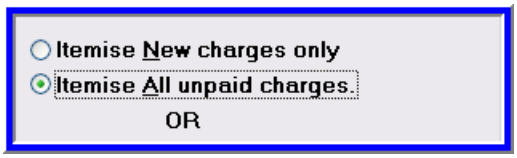
- The cut-off date will automatically load a one-week cut-off (skip anyone who received an account in the last week.)

6.2 Controlling which charges are itemized



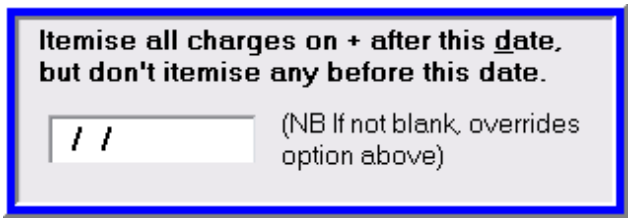
- You can choose to skip patients if there are no new charges or no claim number

There are two mutually exclusive approaches to the account print run.

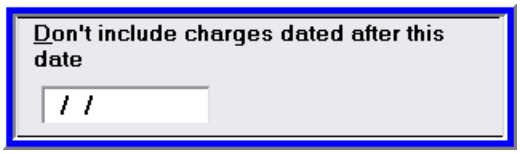


- Itemise New Charges only – your account will print a Balance brought forward from the most recent previous account, and then any new charges are itemised.
- Itemise All Unpaid Charges - your account will print all unpaid charges.

OR



- Itemise all charges from a particular date
- Enter a 'cut off' date - all charges incurred on or before that date are covered by a Balance brought forward entry (even if they haven't been printed previously).
- All charges after that date will be itemised even if they have already been printed on an account.



- Ignore charges added after a specified date (Any charges added on or after this date are ignored)

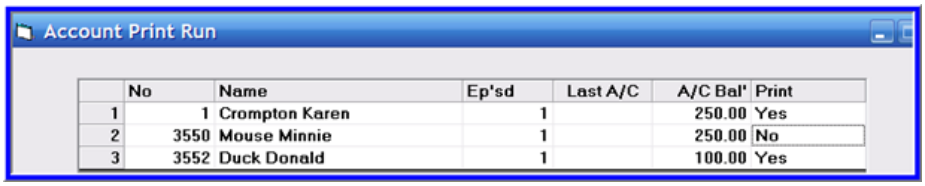
- Choose whether or not to Print the Balance Bought Forward

- Click Continue

6.3 Account print run stage 2

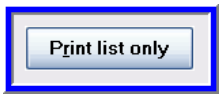
When Stage One is complete and you press the 'Continue' button, the program will scan your patient files and select the patients that meet the requirements you specified in Stage One.

A list is displayed on screen. You can then proceed to do the following: -


Account Print Run
No Name Ep'sd Last A/C A/C Bal' Print
1 1 Crompton Karen 1 250.00 Yes
2 3550 Mouse Minnie 1 250.00 No
3 3552 Duck Donald 1 100.00 Yes

- Look through the list and cancel particular accounts.
- Do this by changing the print status (see the right hand column) from 'Yes' to 'No'.
- You can also view a Client's record by clicking on their number

You can print the listing as shown.



- Press the 'Print list only' button.

You can finish without printing the accounts. Press the 'Exit' button.

6.4 Delay settings

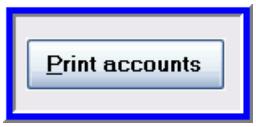
At the bottom of the screen you will see

- Wait 5 seconds after every 1 account - this facility is there so you can instruct the program to print a certain number of accounts and then pause for up to a minute.

- These numbers are changed by clicking on them and typing in the desired number.

- You can disable this option by setting the delay or the number of accounts to ‘0’ – this means you will not be able to print anything else until your account print run has finished

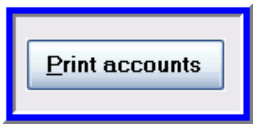
6.5 Print Accounts



- Press the 'Print accounts' button to print the accounts
- The program will start at the top of the list and print an account for each entry that has a 'Yes' in the Print column of the list. As each account is printed the 'Yes' will change to 'No'.

6.6 Pausing or stopping the print run

- When printing starts, a Pause button will appear.
- Pressing this button at any time will have the printing process complete the account it is working on and then stop and return to the print list as at the end of Stage Two.



- You can restart printing by pressing the “Print accounts” button again.
- Already printed entries will be skipped, as their print status will now read 'No'. (You can request any of these entries by changing their 'No' status back to 'Yes' by clicking on the 'No').

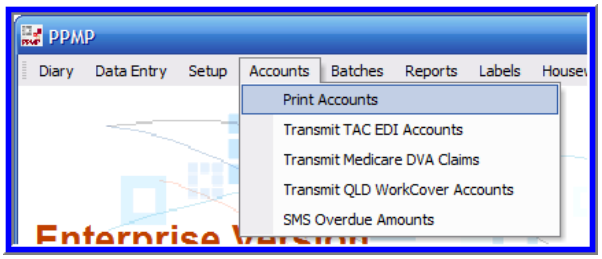
6.7 Change the print delay settings during printing.

You can change the delay time, the number of accounts printed between delays, or disable this facility, while the printing is taking place.

6.8 Email accounts

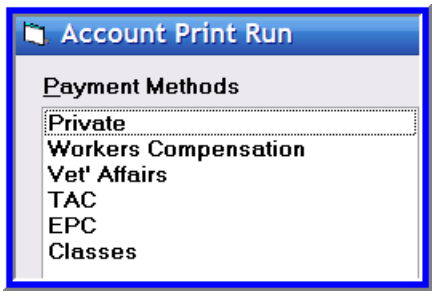
6.9 Email accounts – Stage 1

On the Main Menu PPMP®

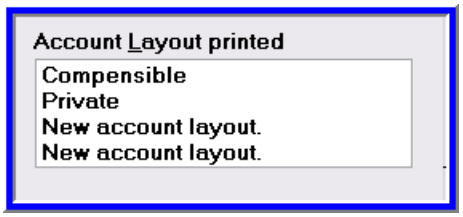


- Click Accounts
- Click Print Accounts

Supply the settings that will be used to decide who should receive an account.

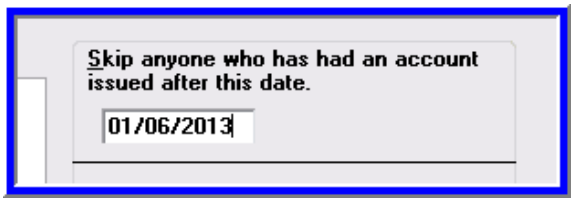


- Select the payment methods to be included in this run.



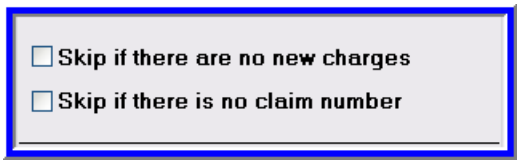
- Choose what account layout you want used.
- Only one account style can be chosen at a time

- No need to choose a Treatment Location (all will be included)



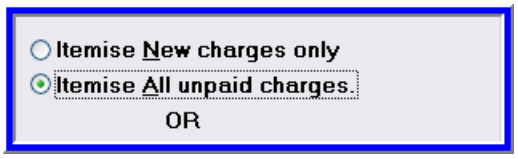
- The cut-off date will automatically load a one-week cut-off (skip anyone who received an account in the last week.)

Controlling which charges are itemized



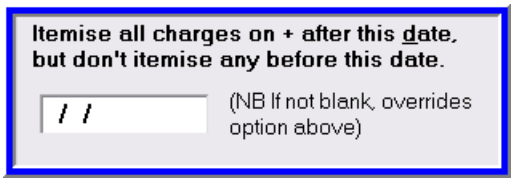
- You can choose to skip patients if there are no new charges or no claim number

There are two mutually exclusive approaches to the account print run.

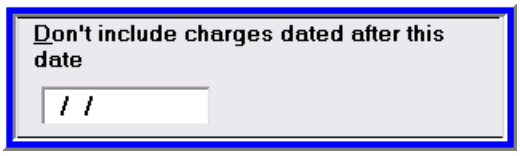


- Itemise New Charges only – your account will print a Balance brought forward from the most recent previous account, and then any new charges are itemised.
- Itemise All Unpaid Charges - your account will print all unpaid charges.

OR



- Itemise all charges from a particular date
- Enter a 'cut off' date - all charges incurred on or before that date are covered by a Balance brought forward entry (even if they haven't been printed previously).
- All charges after that date will be itemised even if they have already been printed on an account.



- Ignore charges added after a specified date (Any charges added on or after this date are ignored)

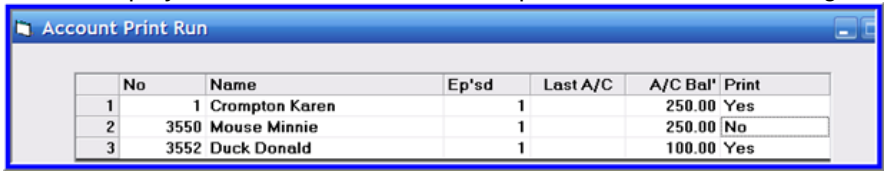
- Choose whether or not to Print the Balance Bought Forward

- Click Continue

6.10 Email accounts – Stage 2

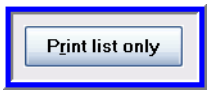
When Stage One is complete and you press the 'Continue' button, the program will scan your patient files and select the patients that meet the requirements you specified in Stage One.

A list is displayed on screen. You can then proceed to do the following:

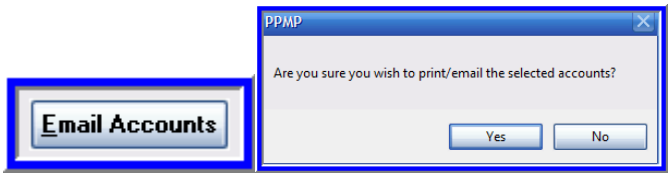

Account Print Run
No Name Ep'sd Last A/C A/C Bal' Print
1 1 Crompton Karen 1 250.00 Yes
2 3550 Mouse Minnie 1 250.00 No
3 3552 Duck Donald 1 100.00 Yes

- Look through the list and cancel particular accounts.
- Do this by changing the print status (see the right hand column) from 'Yes' to 'No'.
- You can also view a Client's record by clicking on their number

You can print the listing as shown.



- Press the 'Print list only' button.
- Press the 'Email accounts' button to email the accounts

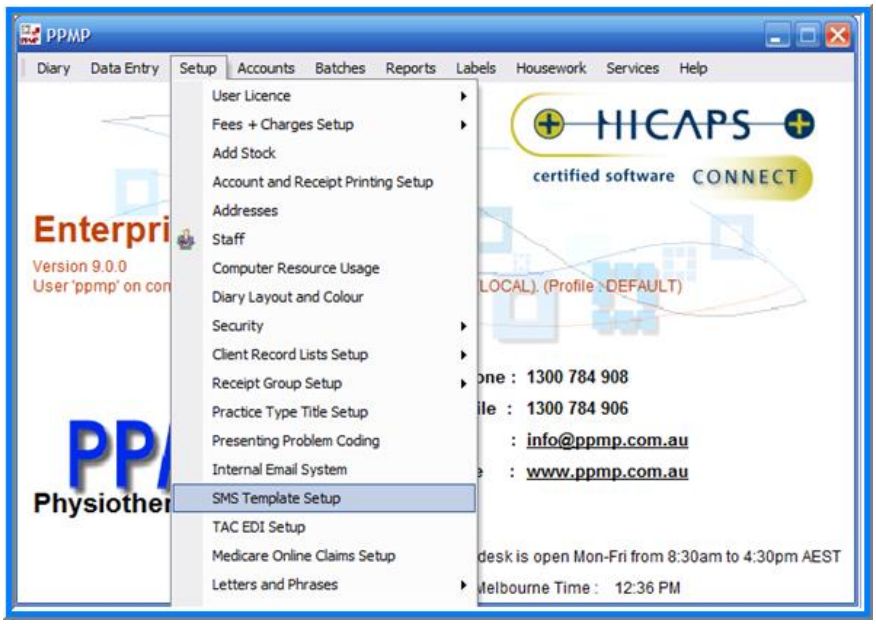


- Click Yes to send the Accounts via email

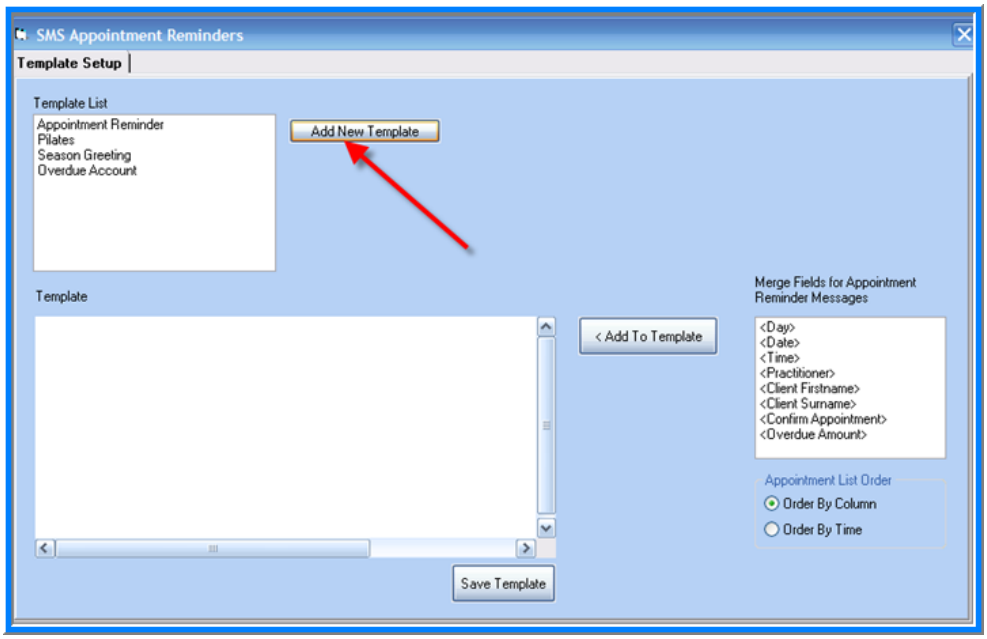
6.11 SMS overdue accounts

Click HERE to watch video

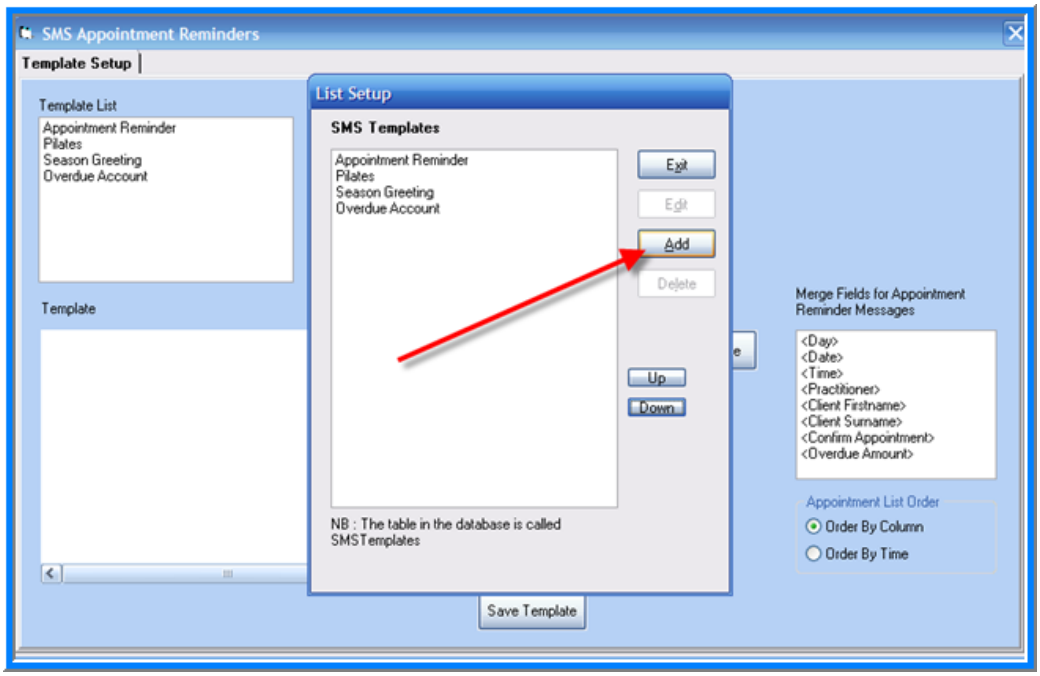
NB: You will need to set up an Account or Overdue account SMS template first.
To do this on the Main Menu PPMP®



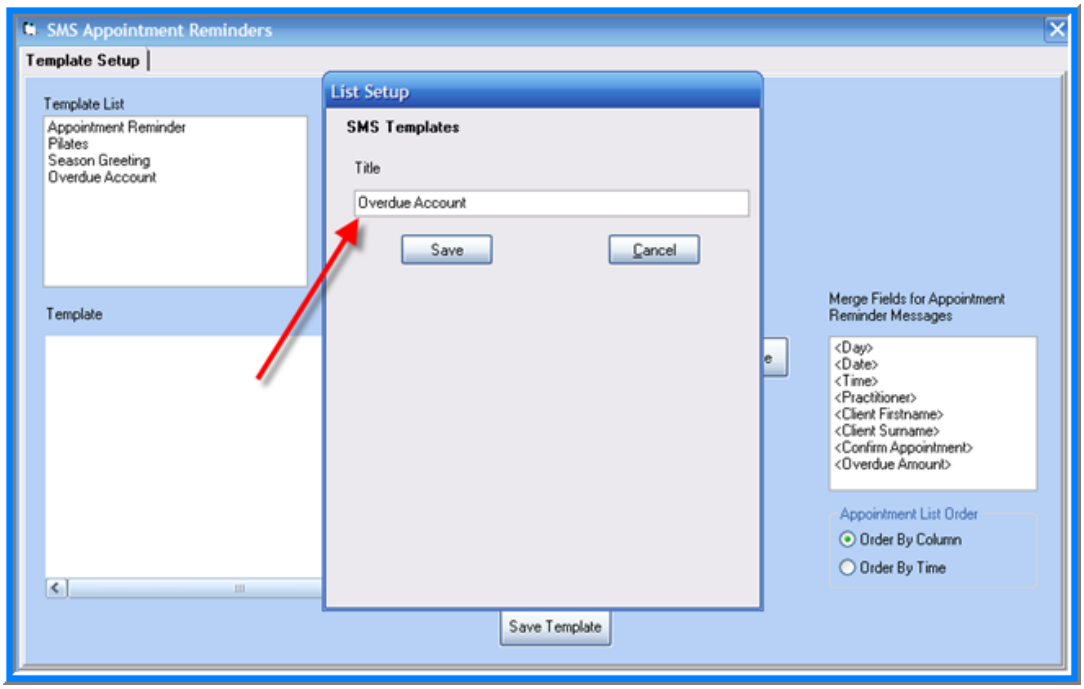
- Go to SMS Template Setup



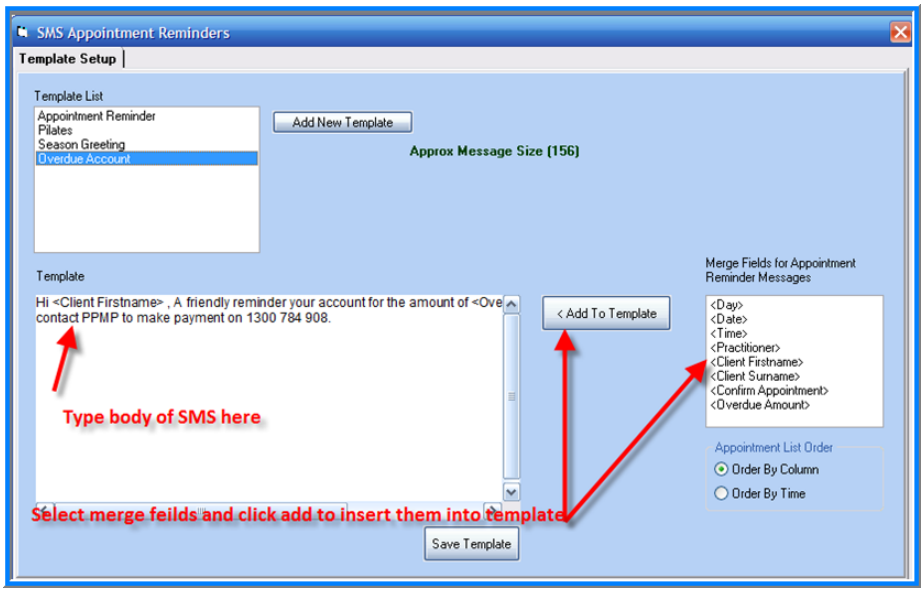
- Click Add New Template



- Click Add

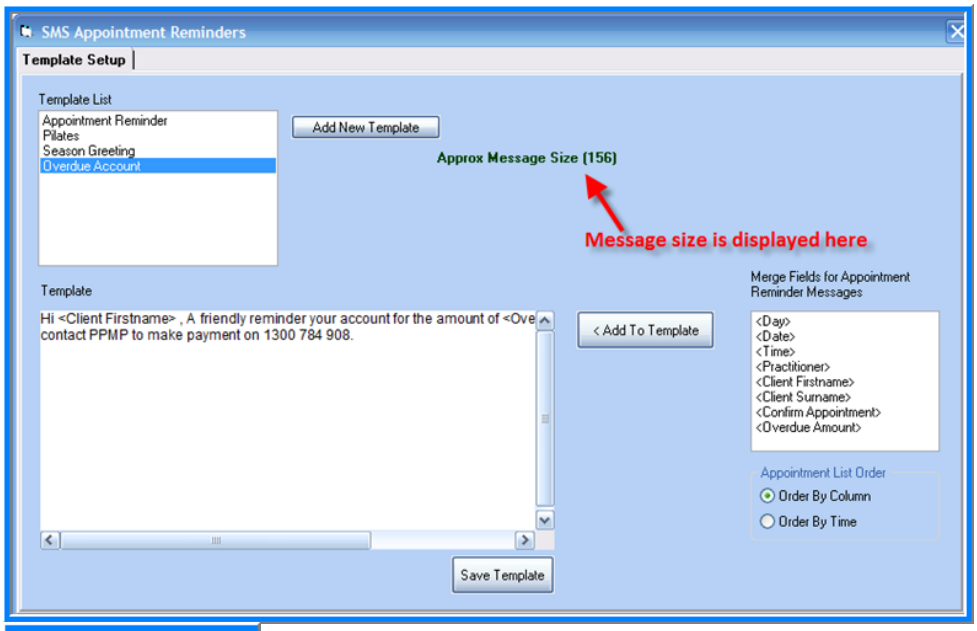


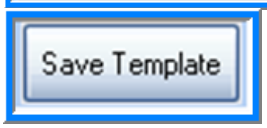
- Type in title for new SMS template (e.g. Account or Overdue account)
- Click save



- Select the template in the list you want to setup and type in the information you require.

  NB: The Approximate message size will also be displayed and how many messages you will be charged for (see examples below)



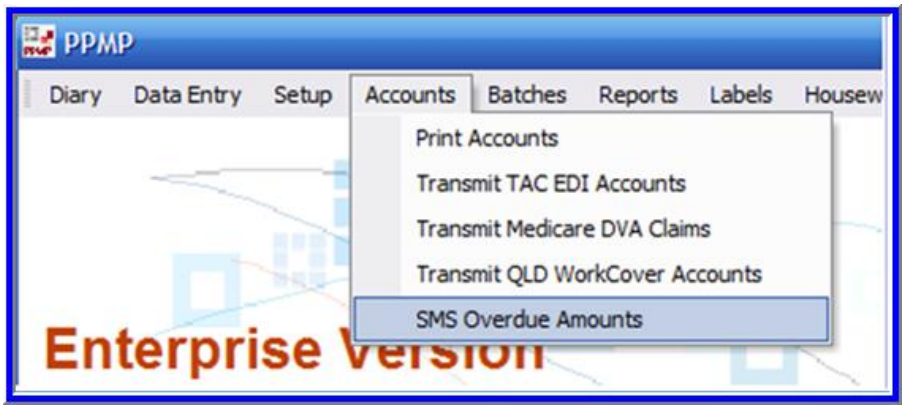


- Click save template

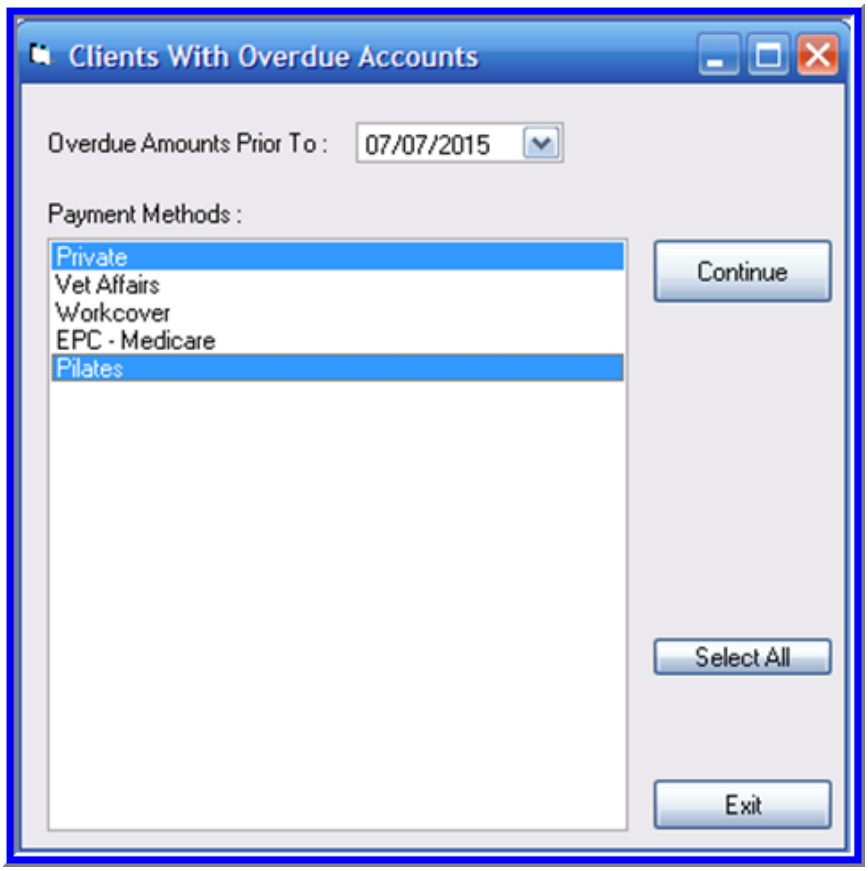
6.12 SMS account run

Click HERE to watch video

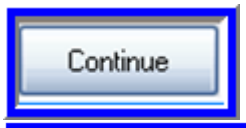
On the Main Menu PPMP®

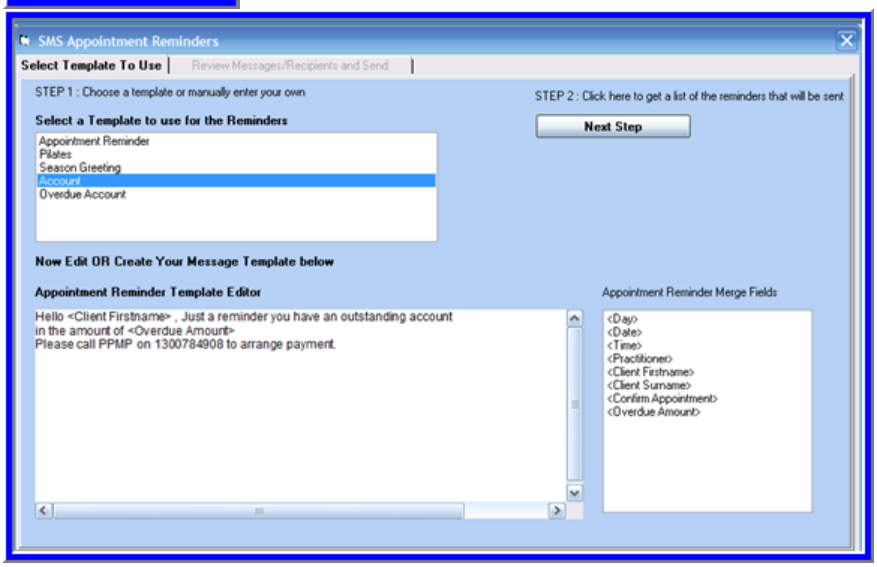


- Select Accounts
- Select SMS Overdue Amounts

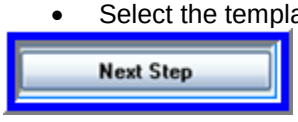


- Click Continue

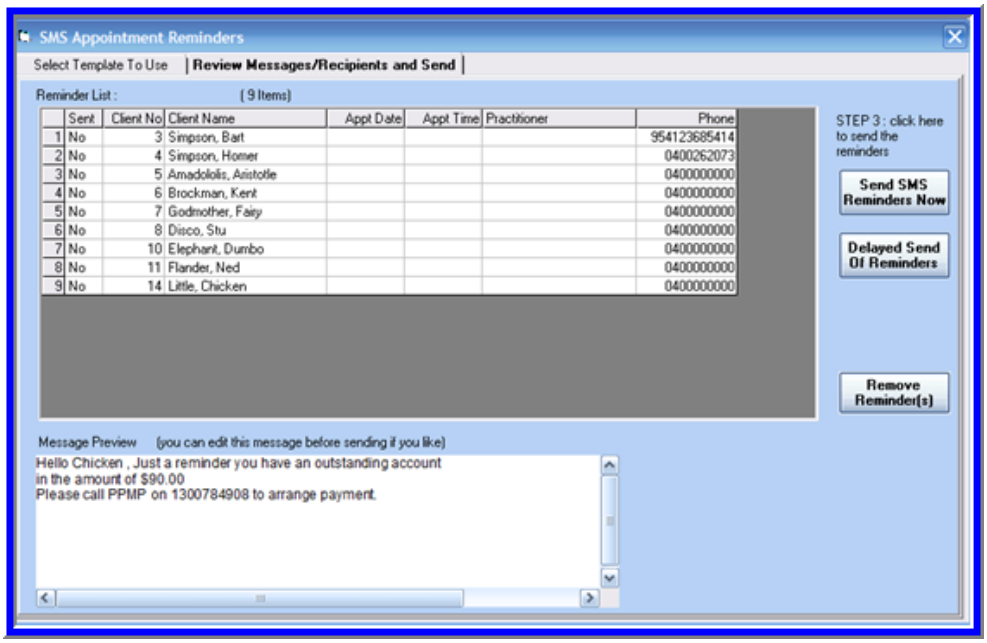




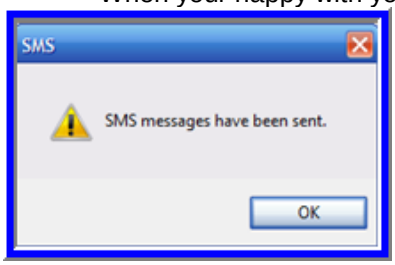
- Select the template you wish to use and click Next Step



- You can now either send SMS accounts now or remove any you do not wish to send or even delay the sending of the accounts to a later time and date.


SMS Appointment Reminders
Select Template To Use
Review Messages/Recipients and Send
Reminder List :
(9 Items)
Sent
Client No
Client Name
Appt Date
Appt Time
Practitioner
Phone
1 No 3 Simpson, Bart 954123685414
2 No 4 Simpson, Homer 0400262073
3 No 5 Amadolollis, Aristotle 0400000000
4 No 6 Brockman, Kent 0400000000
5 No 7 Godmother, Fairy 0400000000
6 No 8 Disco, Stu 0400000000
7 No 10 Elephant, Dumbo 0400000000
8 No 11 Flander, Ned 0400000000
9 No 14 Little, Chicken 0400000000
STEP 3 : click here to send the reminders
Send SMS Reminders Now
Delayed Send Of Reminders
Remove Reminder(s)
Message Preview (you can edit this message before sending if you like)
Hello Chicken , Just a reminder you have an outstanding account in the amount of $90.00
Please call PPMP on 1300784908 to arrange payment.

- When your happy with your selections click Send SMS Reminders Now



- Your messages have now been sent.

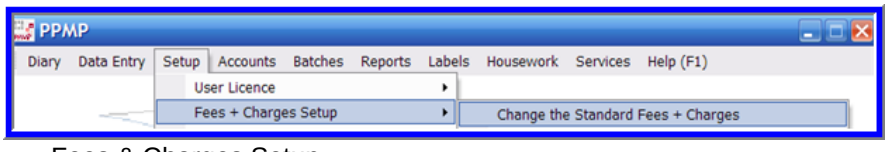
7 Alarms

The PPMP system has an alarm function, which can warn you about the number of treatments for a patient.

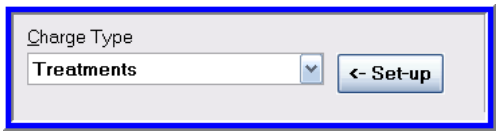
For compensation patients in particular or any patient in the database there is a function that allows you to set a date or a specific number of treatments, where once they have reached or passed the set date or treatment number the system will give you a warning.

Before setting alarms you must make sure your Treatments are being marked as Treatments – to do this

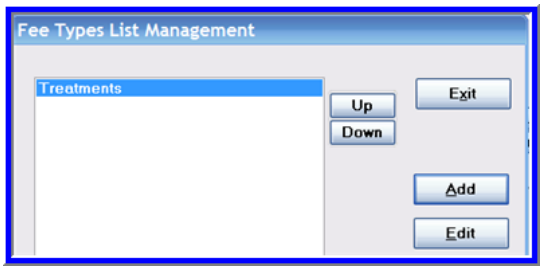
Go to Setup (on the Main Menu)



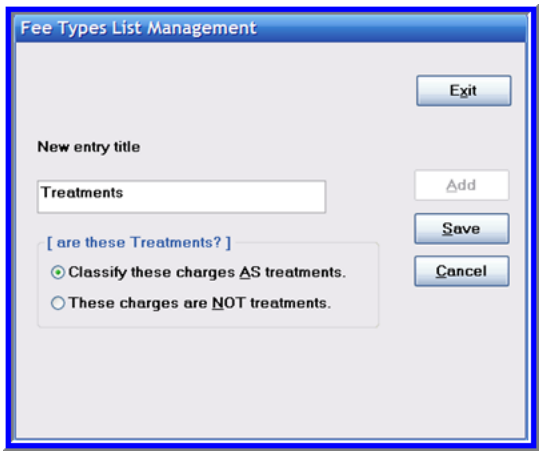
- Fees & Charges Setup
- Change the Standard Fees & Charges



- Click Setup (next to Charge Type)



- Select Treatments
- Click Edit



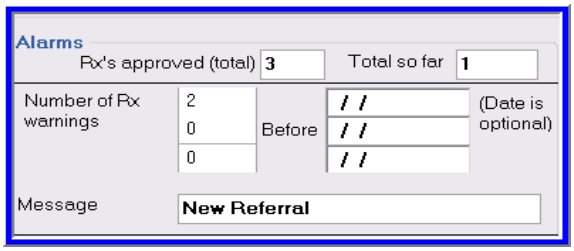
- Select “Classify these charges AS treatments”
- Save & Exit and back to the main menu.

Episodes for Mickey Mouse
Exit A/C Info Attendance Notes Printout
Episode Details Notes Alarms - To Do List Discharge Addresses TAC/DVA Documents Chart

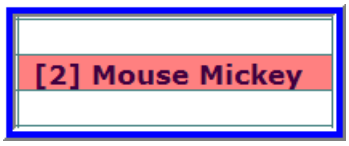
- Open a client’s file and go to Episodes
- Click on Alarms – To Do List

There are a few different alarms explained as follows: -

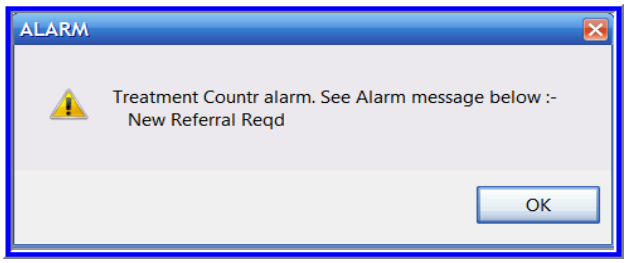
7.1 Number of Treatments Approved (total)



- Put into Rx’s approved (total) the number of treatments approved. Each time a Treatment is charged the “Total so far” will increase.
- Put a number in the field beside the “Number of Rx warnings” and a small message in the message field.



- When the client comes within the last 2 of these treatments their name will appear in a light red/pink background with the Number of remaining approved treatments beside it.

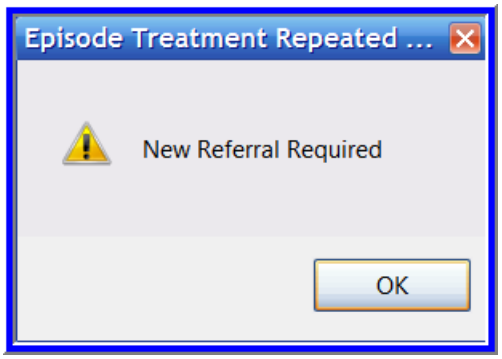


- By entering the date after the number of treatments this allows you to set a number of treatments within a certain time frame and a small message in the message field. Therefore once the patient has been charged for the number of treatments set in the alarm section (before the optional date) you will receive the message as a warning.

- When they exceed the Number of approved treatments their name will appear in red with a negative number beside it.

7.2 Repeated Appointments

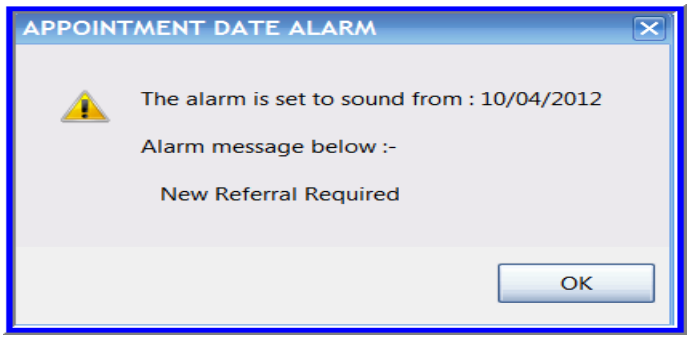
- If you want to be reminded every so many appointments e.g. if you wanted to review a case say every 6th visit.



- This alarm is triggered at the time the treatment is recorded (charged).

7.3 New Appointment

- Enter a date in the "Warn if new appointment is after this date" alarm field and a small message,



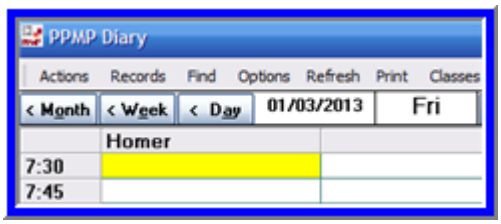
- When making an appointment on the diary after that date the alarm will be triggered and the message will be displayed.

8 Appointments

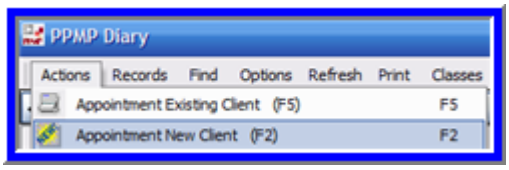
When making an appointment you will be faced with one of three situations.

- For a New client
- For an existing client
- For an existing client who **has** an appointment already on the diary.

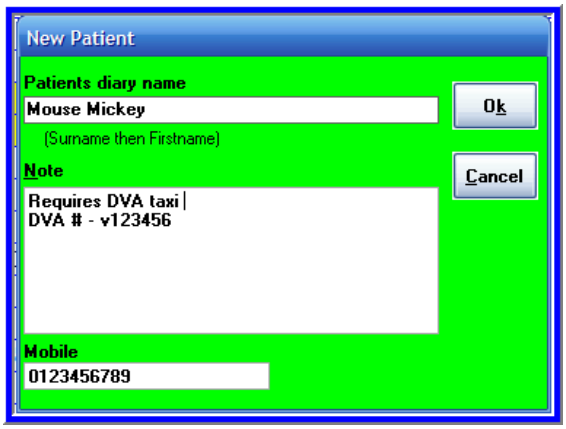
8.1 New client appointments



- Select the appointment day, time and column where you want to put the appointment.

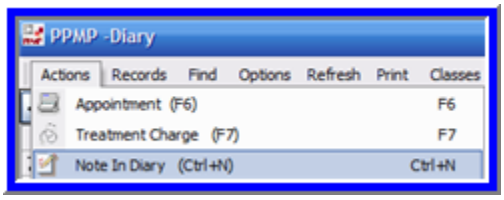

PPMP Diary
Actions Records Find Options Refresh Print Classes
Appointment Existing Client (F5) F5
Appointment New Client (F2) F2

- Click 'Actions'
- Select 'Appointment New Client'

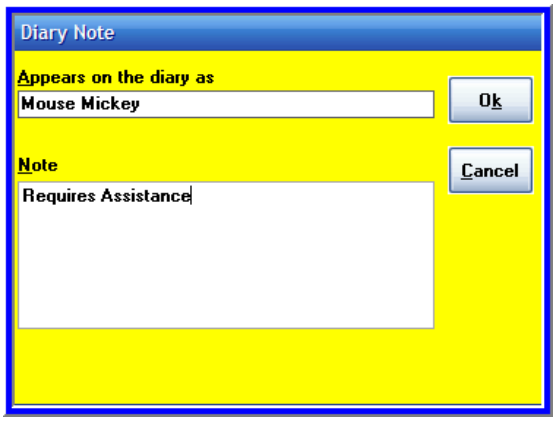


- An input box will be displayed with an area to type the patient's name.
- It is recommended you use the convention **Surname** then First name when entering names.
- Press Enter
- This will move you to the notes area. (Use this to make a note about new patients e.g. Requires assistance or phone numbers
- Press Enter
- Enter a mobile number (if necessary)
- Click Ok to record the entry

You can view a new client's note area by highlighting the appointment,



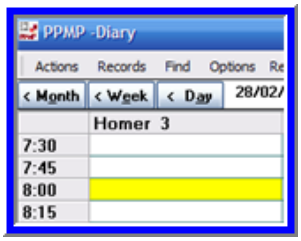
- Click Actions
- Click Note in diary



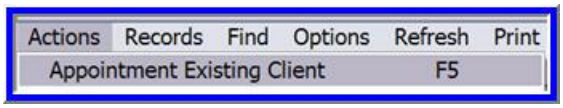
- You should now be viewing the above screen – you can add or change things in the note or mobile area.

8.2 Existing client appointments

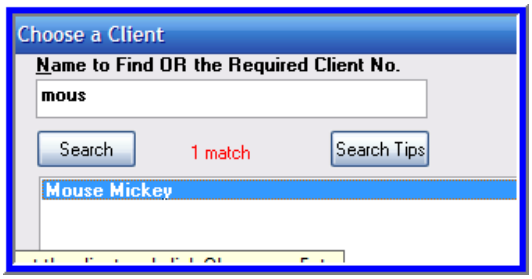
Click HERE to watch video



- Select the appointment day, time and column where you want to put the appointment.



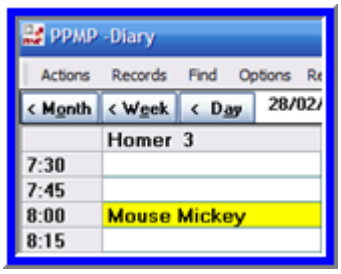
- Click Actions
- Select Appointment Existing Client



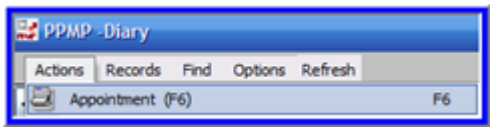
- The Choose a Client box will appear
- Type in Surname of client (or 3-4 letters)
- Highlight the client you want on the list
- Click OK - the appointment will be entered on the diary.

8.3 Rebooking clients from a diary appointment

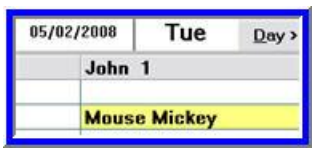
Click HERE to watch video



- Select the existing appointment from the diary.



- Click Actions
- Click Appointment

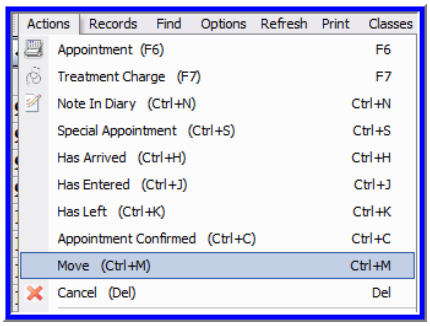


- Move to where you want to put the new appointment & Press Enter

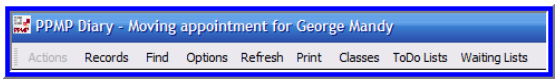
8.4 Moving appointments

Click HERE to watch video

- Select the appointment on the diary that you want to move.
- Click Actions
- Select move


Actions Records Find Options Refresh Print Classes
Appointment (F6) F6
Treatment Charge (F7) F7
Note In Diary (Ctrl+N) Ctrl+N
Special Appointment (Ctrl+S) Ctrl+S
Has Arrived (Ctrl+H) Ctrl+H
Has Entered (Ctrl+J) Ctrl+J
Has Left (Ctrl+K) Ctrl+K
Appointment Confirmed (Ctrl+C) Ctrl+C
Move (Ctrl+M) Ctrl+M
Cancel (Del) Del

- The patient name will disappear off the diary and show in the top bar of PPMP®.

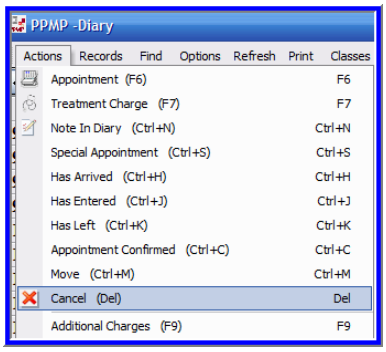

PPMP Diary - Moving appointment for George Mandy
Actions Records Find Options Refresh Print Classes ToDo Lists Waiting Lists

- Select the appointment day, time and column where you want to move the appointment to and double click on the empty spot to insert the patient.

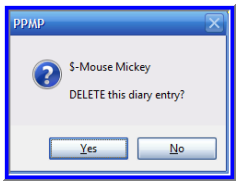
8.5 Cancelling appointments

Click HERE to watch video

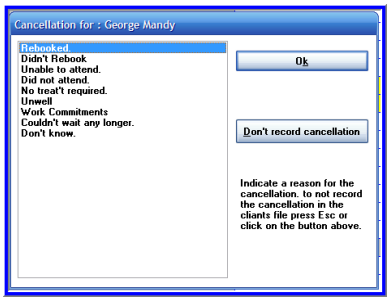
- Select the appointment on the diary that you want to cancel.
- Click Actions
- Select cancel



- A new option menu will now appear

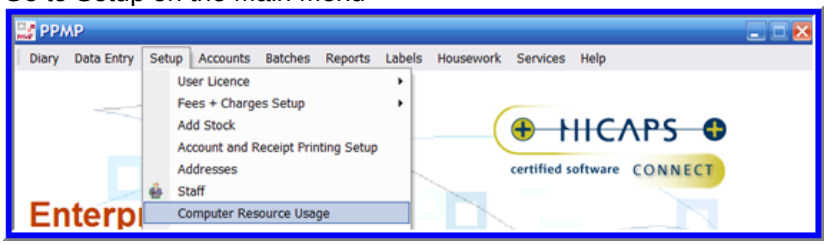


- At this stage if you have made a mistake you can select no and nothing will be canceled.
- Select **YES** if you are sure you you want to cancel this appointment.
- You will now be given an option list to record the reason for the cancelation.
- Select the reason and click ok.

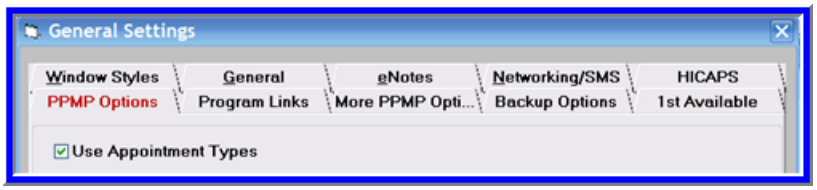

Cancellation for : George Mandy
Rebooked.
Didn't Rebook.
Unable to attend.
Did not attend.
No treat't required.
Unwell
Work Commitments
Couldn't wait any longer.
Don't know.
Ok
Don't record cancellation
Indicate a reason for the cancellation. to not record the cancellation in the cliants file press Esc or click on the button above.

9 Appointment types

Go to Setup on the Main Menu



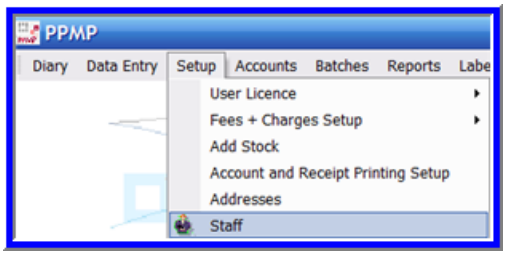
- Computer Resource



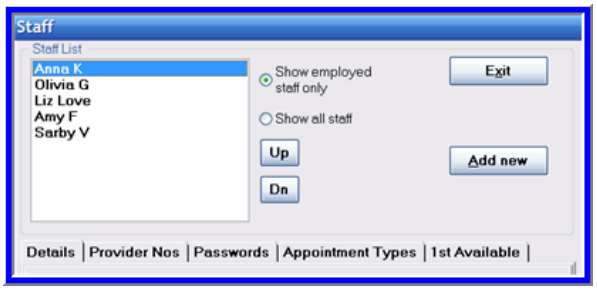
- Click PPMP Options
- Tick Use Appointment Types

- Click OK
- Close PPMP and Re Open

On the Main Menu

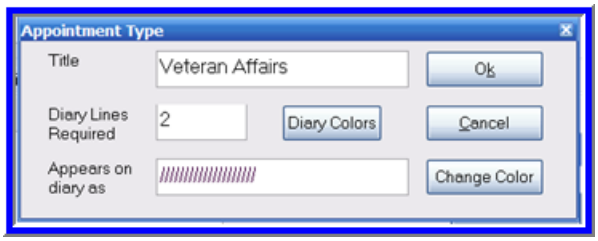


- Go to Setup
- Staff

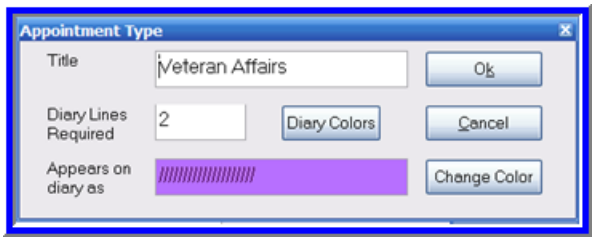


- Select staff member
- Select Appointment Types

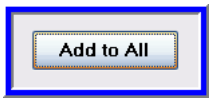
- Click Add New



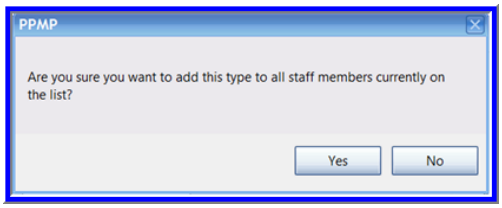
- Enter a Title Name
- Select how you would like it to appear on the diary
- Click Change color



- Click OK
- Continue this process until all Appointment types have been created



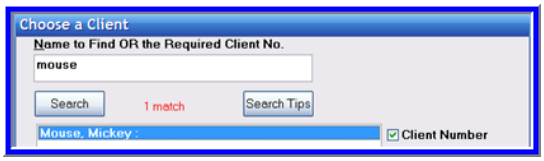
- Click Add to All (this will add the same appointment types to all staff)



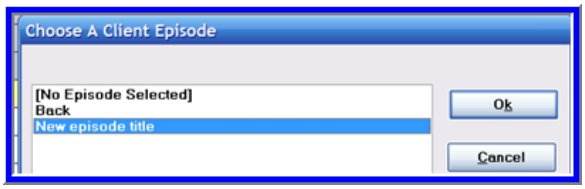
- Click Yes

9.1 Making appointment types

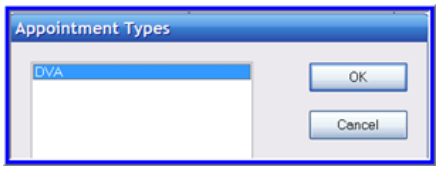
- Click Actions
- Click Appointment Types



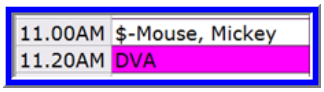
- Select client
- Click OK



- Select Episode
- Click OK



- Appointment Types will be listed
- Select the Appointment type (DVA)



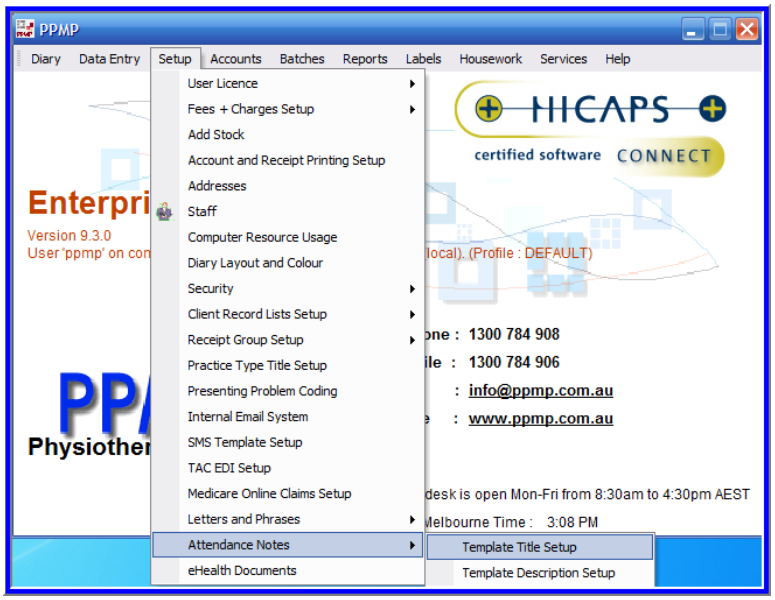
- The Appointment type requires 2 lines
- Charge and receipt as normal

10 Attendance notes, template setup - charts – viewing/editing

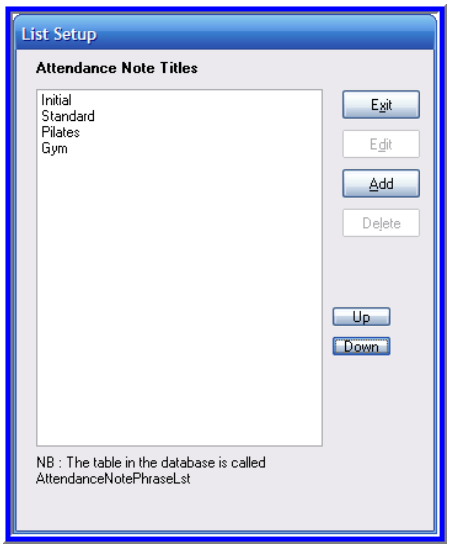
Click HERE to watch video

10.1 Template setup

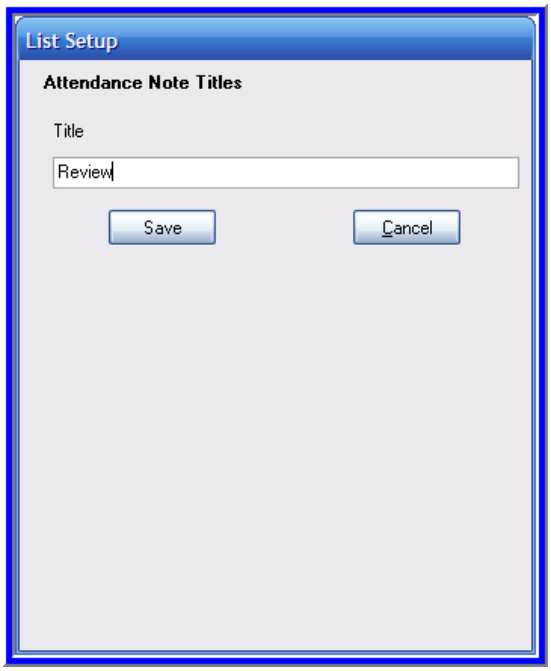
From the Main Menu of PPMP®



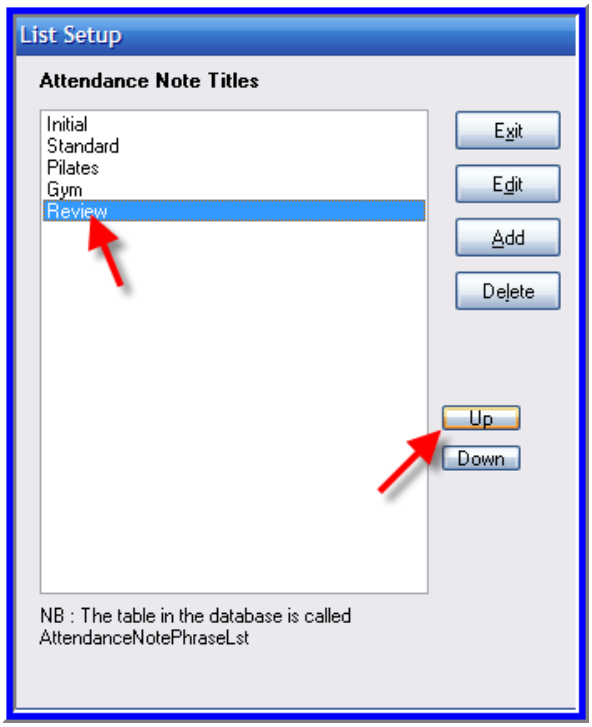
- Select Setup
- Select Attendance notes
- Select Template Title Setup



- List Setup screen appears
- Click Add for a new title

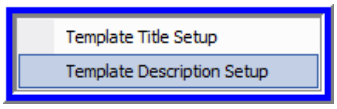


- Type the new title list name and click save

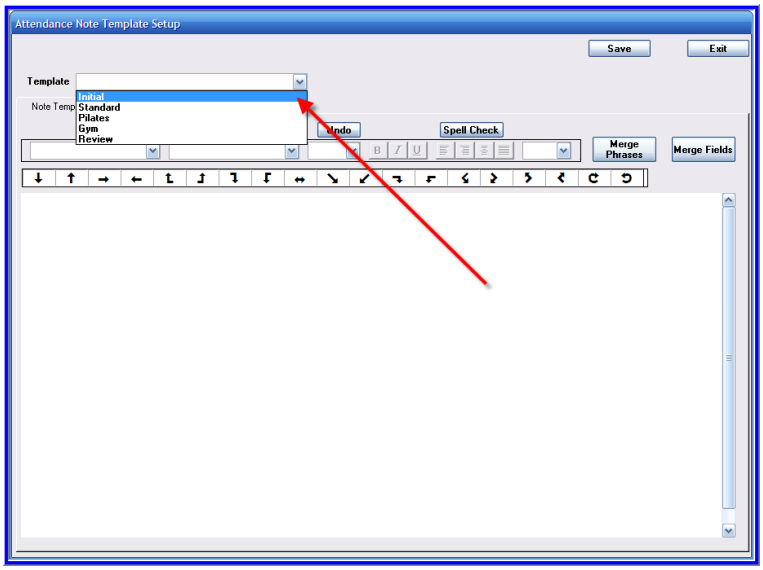


- The new title will appear in the list. You can move its position in the list with the UP/DOWN buttons on the right-hand side.
- Once happy with the list and all Title Templates are set click Exit

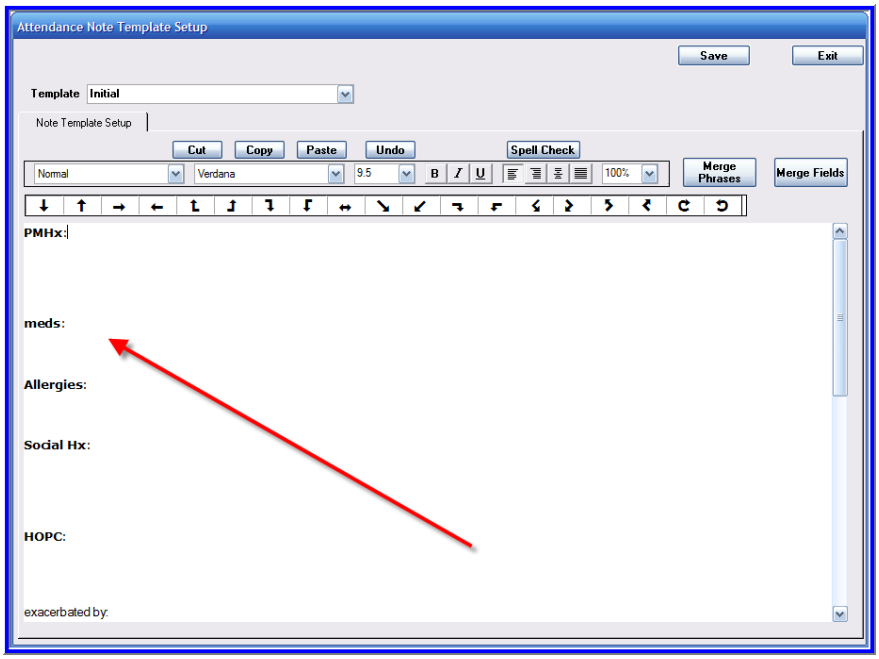
10.2 To add the body of the template



- Select Setup
- Select Attendance notes
- Select Template Description Setup

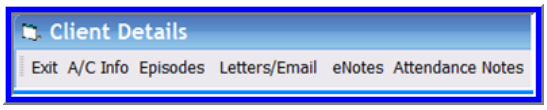


- Select the drop down box and select the Title you wish to edit
- Select Attendance notes
- Select Template Description Setup

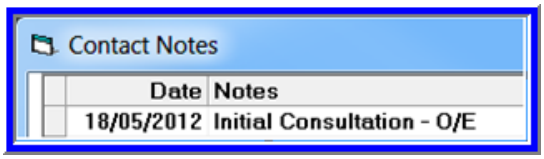


- Simple type in your information you can also use merge fields in here.
- Click Save & Exit
- Repeat this for all titles you wish to set a template in

Go to Client Details Screen

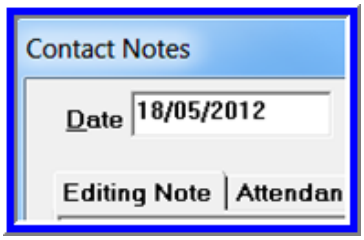


- Select Attendance Notes

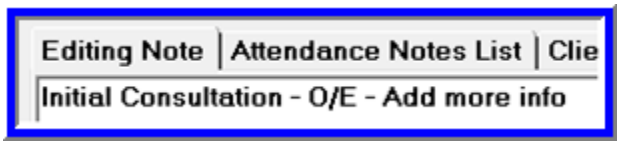


- Select Date for Editing

- Click Edit



- Click Editing Note

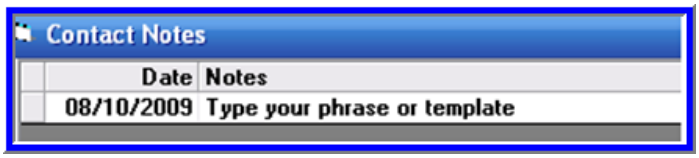


- Add extra text to your notes

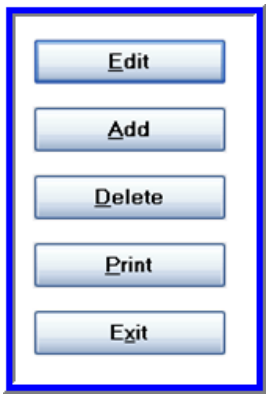
- Click Exit & Save Changes

- Phrase is inserted in notes
- You can add or edit text – click on date

- Click Exit & Save Changes



- All notes are listed



- Click on entry – select Edit, Add, Delete, Print
- Exit

OR

- Select client on diary and go to Episodes
- Click Add
- Follow the above steps.

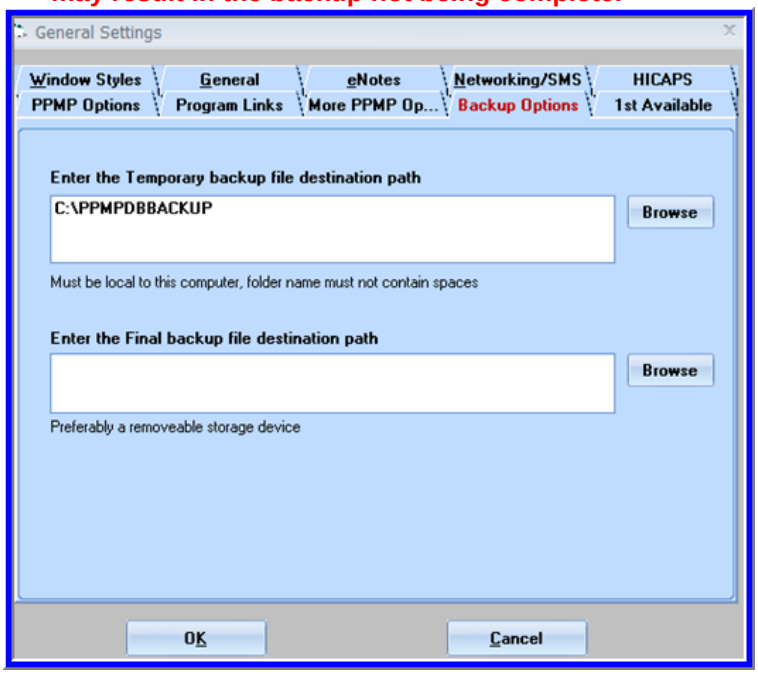
11 Backup instructions

Click HERE to watch video

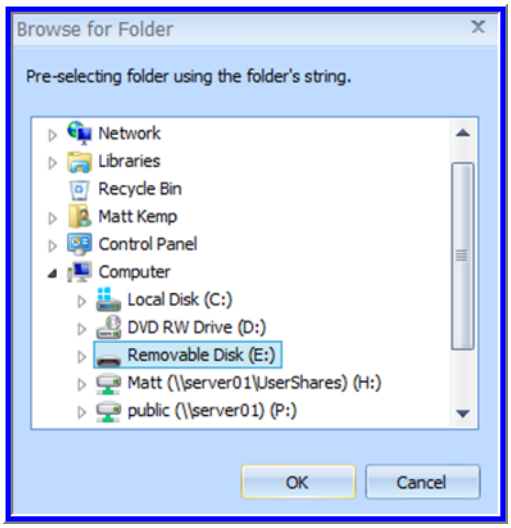
- Go to the Main Menu (PPMP®)
- Select ‘Setup’
- Select ‘Computer Resource Usage’

- Click on the ‘Backup Options’ tab

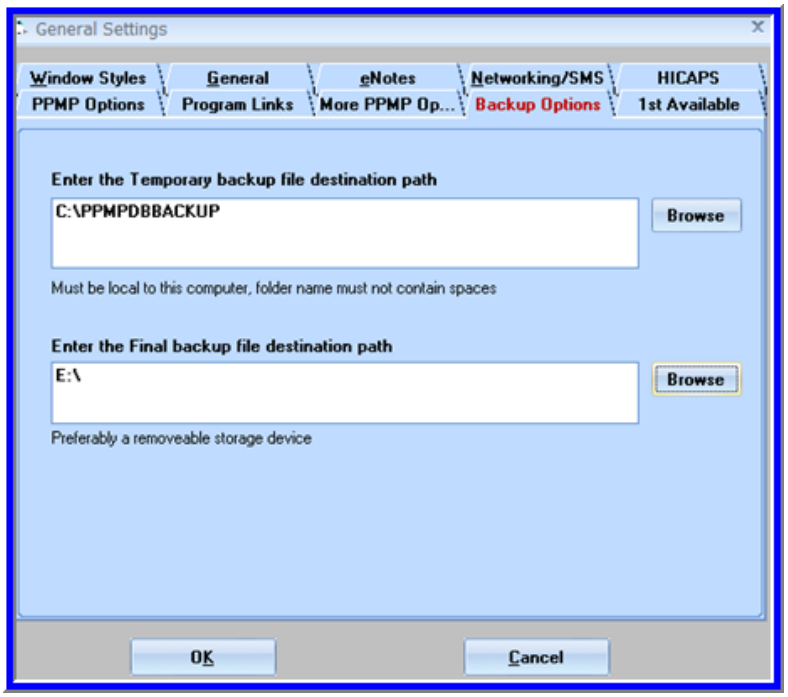
NB: The temporary backup location is set to a default location; do not change this as incorrect settings may result in the backup not being complete.



- Then select ‘Browse’ to enter in the final backup file destination path
  Select the external drive you wish to backup to (do not select the Local Disk). Backups must go to a removable drive that can be taken offsite.
- Click ‘OK’

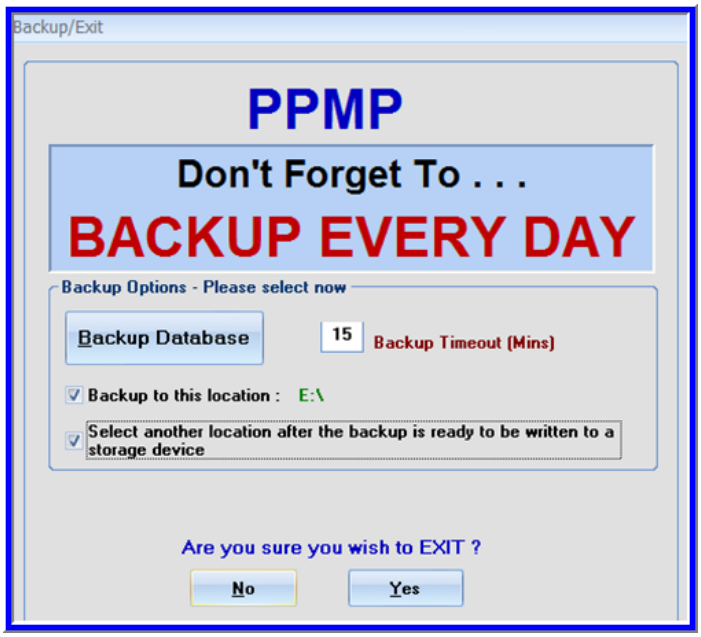


- Once you have selected the location click the 'OK' button

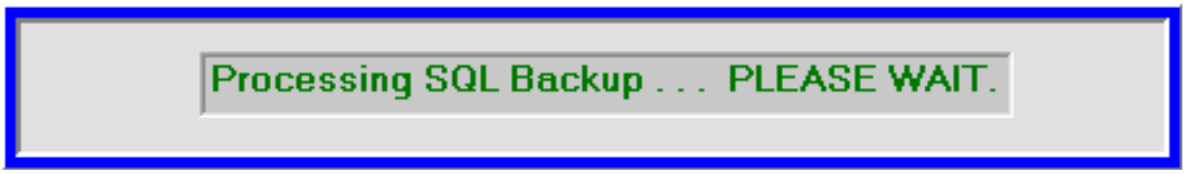


- You will then be taken back to the home screen
- For the changes to take effect you need to restart PPMP®. Click the 'X' in the top right hand corner

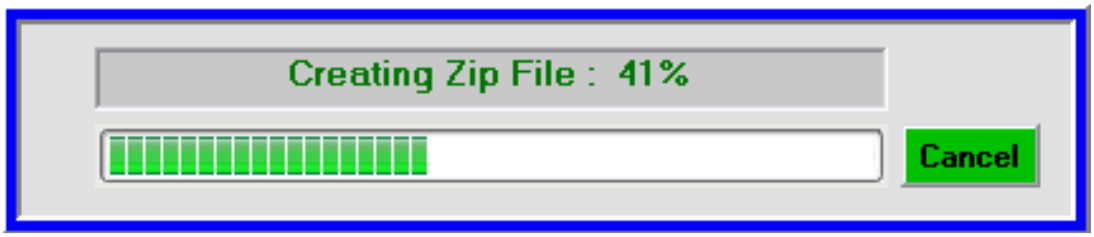
- If you wish to backup to another location, select the 2nd tick box. Once the initial backup is complete you will be prompted to select the location you wish to backup to.
- Click 'Backup Database'


Backup/Exit
PPMP
Don't Forget To . . .
BACKUP EVERY DAY
Backup Options - Please select now
Backup Database
15
Backup Timeout (Mins)
Backup to this location : E:\
Select another location after the backup is ready to be written to a storage device
Are you sure you wish to EXIT ?
No
Yes

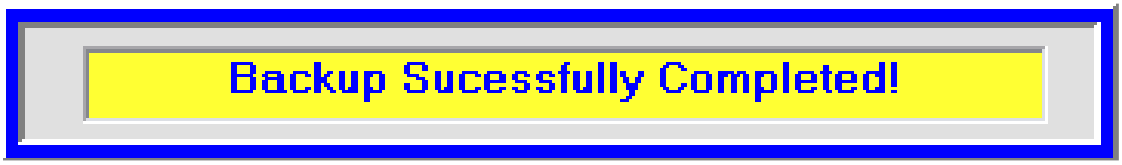
- The following window will appear indicating the backup process is happening…..Please wait



- The following window will appear indicating the zip file is being created…..Please wait



- The following window will appear indicating the backup has been successfully completed.
- You may now exit PPMP® or continue using PPMP®.



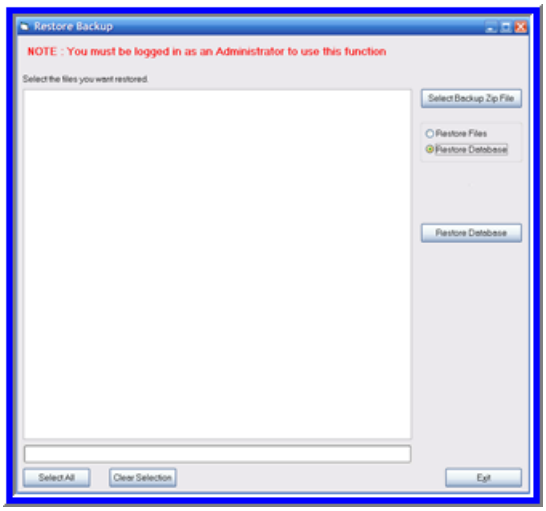
It is advisable to open your backup folder on the removable device and make sure all of the folders and the database are visible. If you are unsure, please contact our Customer Service Team for assistance – 1300 784 908/ Option 1 or info@PPMP®.com.au

If using third party software, please contact us to discuss your requirements or to obtain help with a test restore. We will happily take calls from your IT provider if they have some specific or technical questions.

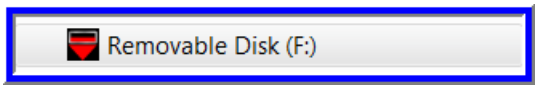
11.1 Restore PPMP® backup

Insert Removable Drive

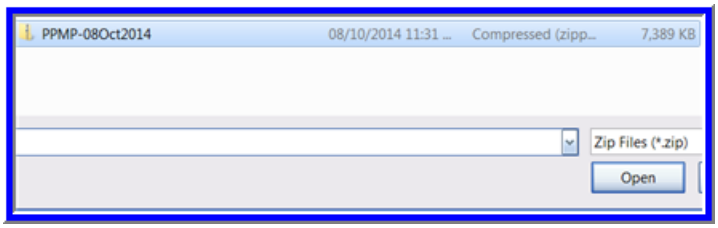
- Click on Services
- Click Restore Backup ZIP file



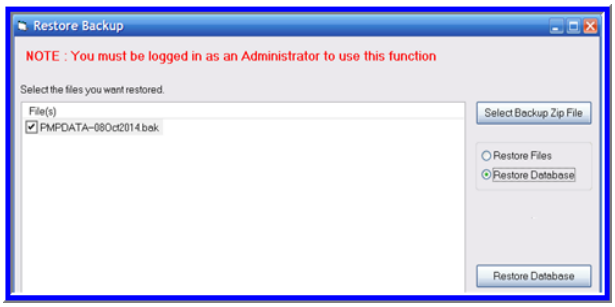
- Click on Restore Database or Select Backup Zip File



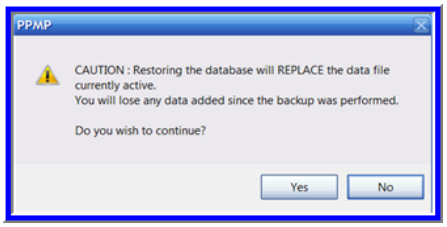
- Select Removable Disk Drive (or where browse to where backup is stored)



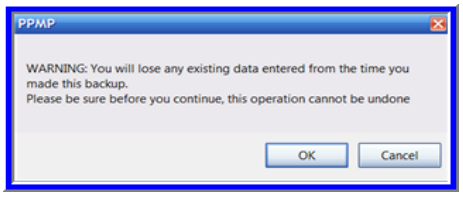
- Click on the file and Open



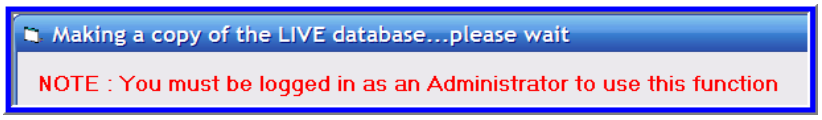
- Click Restore Database


PPMP
CAUTION : Restoring the database will REPLACE the data file currently active.
You will lose any data added since the backup was performed.
Do you wish to continue?
Yes
No

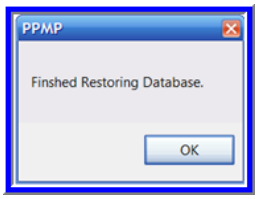
- You will get a warning to make sure you are not restoring over your current database otherwise you may lose some data
- Click Yes


PPMP
WARNING: You will lose any existing data entered from the time you made this backup.
Please be sure before you continue, this operation cannot be undone
OK
Cancel

- You will get another warning
- Click OK

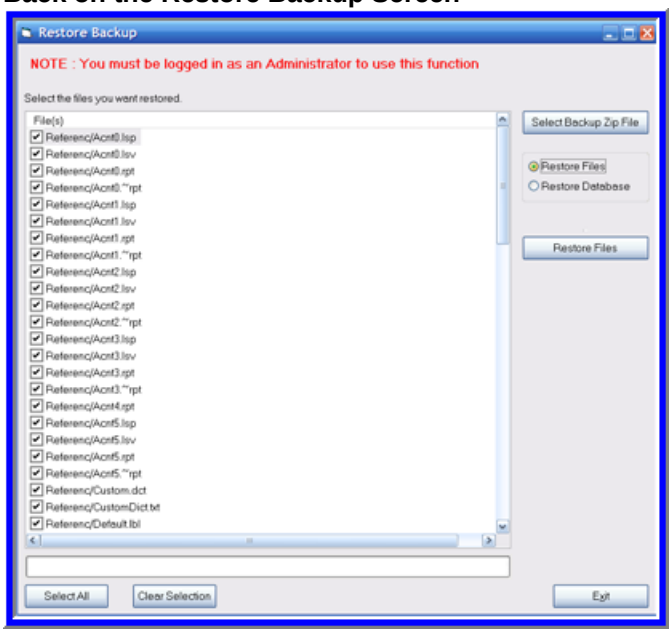


- Note – Making a copy of the Live Database

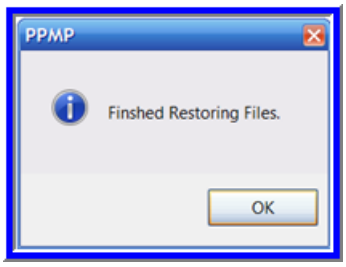


- Click OK

Back on the Restore Backup Screen



- To restore the Files change the selection from Database to Restore Files
- Click Restore Files

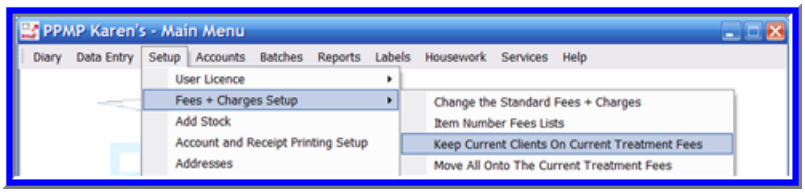


- Click OK
- Click Exit
- Close and re-open PPMP

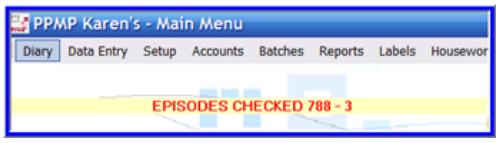
12 Changing fees in PPMP®

If you are wanting to keep you current clients on the current fees for little while longer

On the Main Menu



- Click Setup
- Fees & Charges Setup
- Keep Current Clients on the Current Treatment Fees

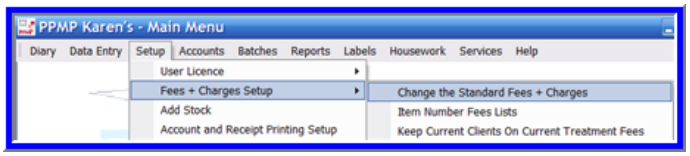


- System is adjusting fees in the client's episode screen

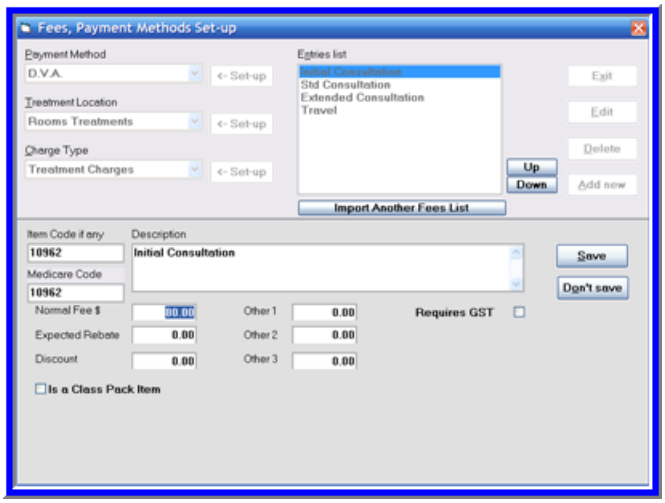
- Click OK

- Under Client Episode you will notice Initial Fee/Usual Fee have your current fees (relating to that episode)

Back on the Main Menu

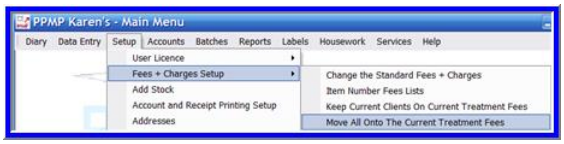


- Click Setup
- Fees & Charges Setup
- Change the Standard Fees & Charges

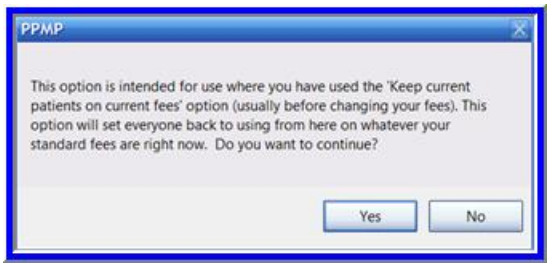


- Go through each Payment method and change Fees
- Click Save

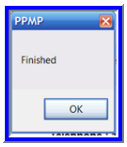
When you are aready to move ALL onto the new fees



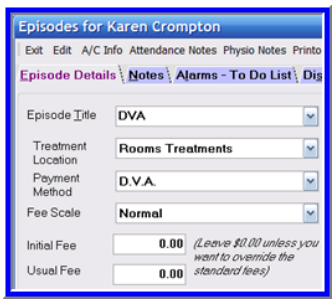
- Click Setup
- Fees & Charges
- Move All onto the Current Treatment Fees


PPMP
This option is intended for use where you have used the 'Keep current patients on current fees' option (usually before changing your fees). This option will set everyone back to using from here on whatever your standard fees are right now. Do you want to continue?
Yes
No

- Click Yes



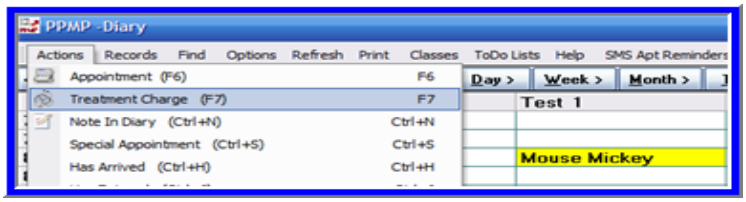
- Click OK



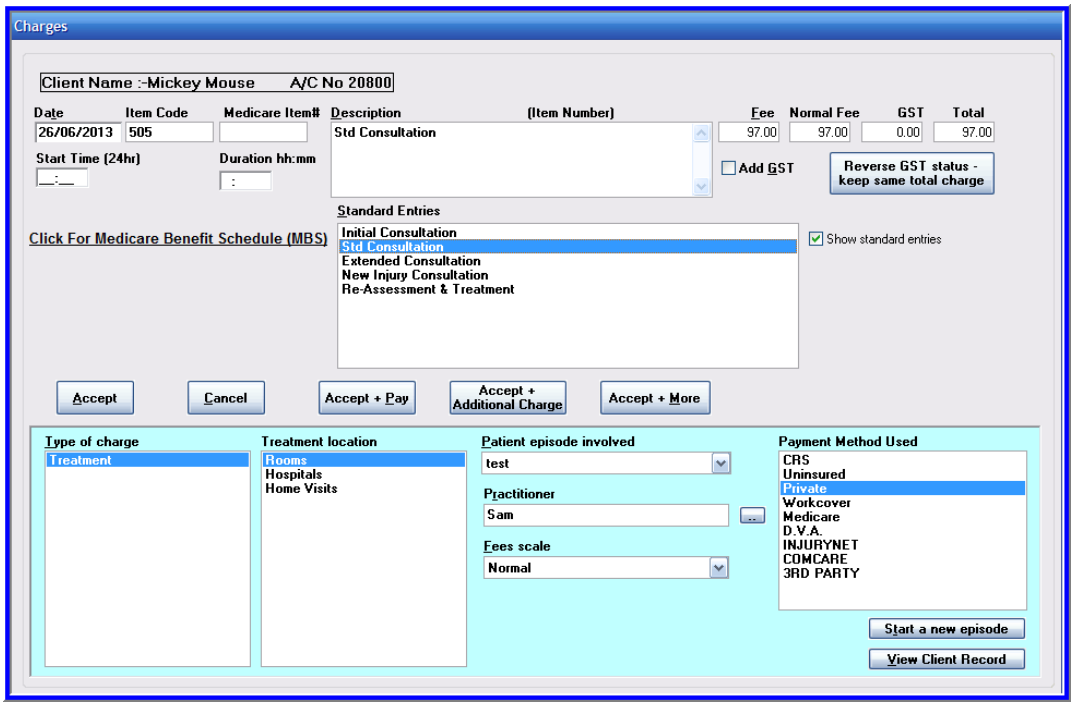
- In the Client Episode Screen the Initial Fee/Usual Fee should now be set to Zero.

13 Charging an appointment

Click HERE to watch video



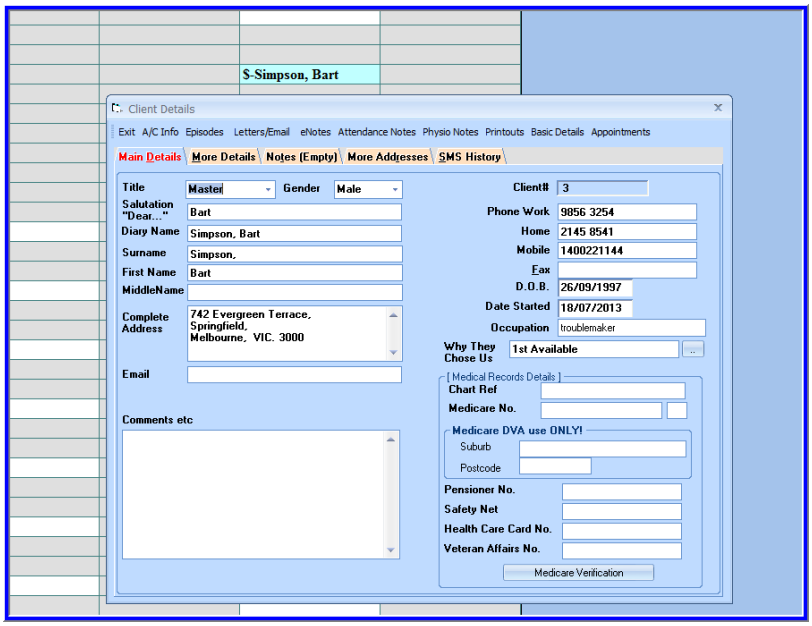
- Select the Client on the Diary
- Click Actions
- Select Treatment charge
- The list of your Fees & Charges will appear
- Select the correct charge



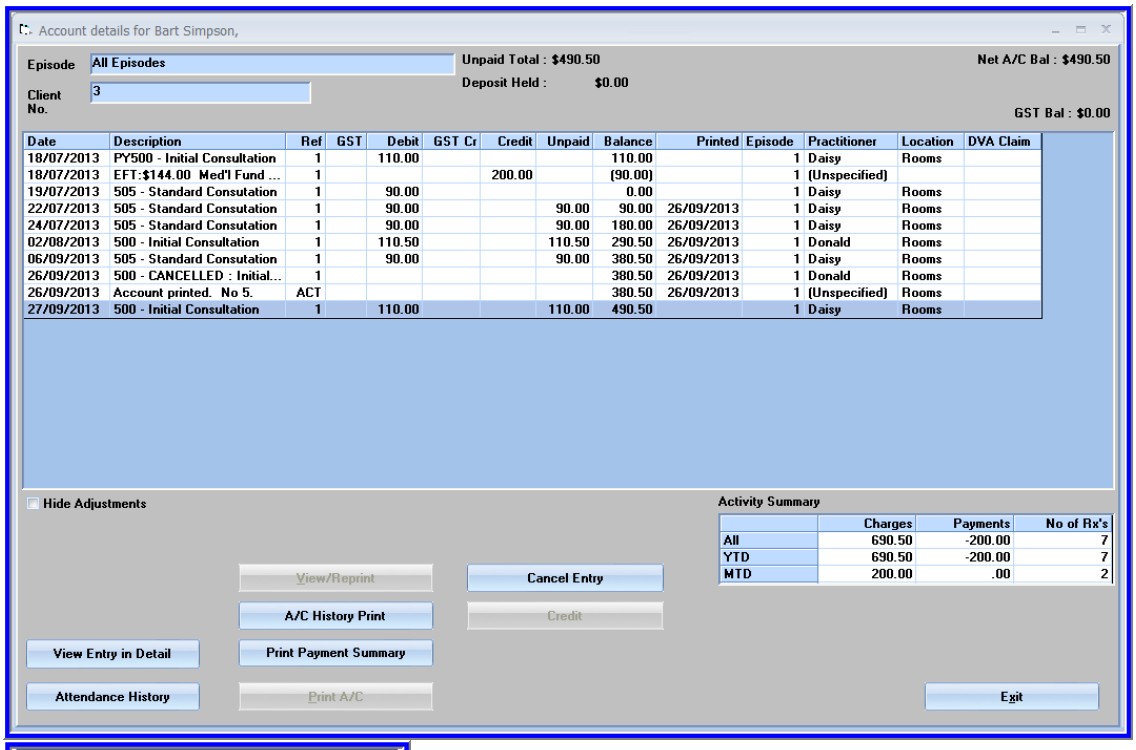
- Click Accept (or Accept + Pay – you will be taken to the Payment screen)

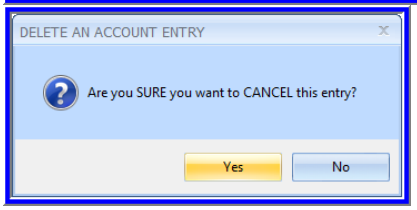
- Once the client has been charged for their treatment, their name on the diary will change colour.

13.1 Cancelling a charge



- Select the Client on the Diary and double click to open the file
- Select A/C Info
- The list of Charges billed will appear
- Select the incorrect charge and click the Cancel Entry button


Account details for Bart Simpson,
Episode All Episodes
Client No. 3
Unpaid Total : $490.50
Deposit Held : $0.00
Net A/C Bal : $490.50
GST Bal : $0.00
Date Description Ref GST Debit GST Cr Credit Unpaid Balance Printed Episode Practitioner Location DVA Claim
18/07/2013 PY500 - Initial Consultation 1 110.00 110.00 1 Daisy Rooms
18/07/2013 EFT:$144.00 Med'l Fund ... 1 200.00 (90.00) 1 (Unspecified)
19/07/2013 505 - Standard Consutation 1 90.00 0.00 1 Daisy Rooms
22/07/2013 505 - Standard Consutation 1 90.00 90.00 90.00 26/09/2013 1 Daisy Rooms
24/07/2013 505 - Standard Consutation 1 90.00 90.00 180.00 26/09/2013 1 Daisy Rooms
02/08/2013 500 - Initial Consultation 1 110.50 110.50 290.50 26/09/2013 1 Donald Rooms
06/09/2013 505 - Standard Consutation 1 90.00 90.00 380.50 26/09/2013 1 Daisy Rooms
26/09/2013 500 - CANCELLED : Initial... 1 380.50 26/09/2013 1 Donald Rooms
26/09/2013 Account printed. No 5. ACT 380.50 26/09/2013 1 (Unspecified) Rooms
27/09/2013 500 - Initial Consultation 1 110.00 110.00 490.50 1 Daisy Rooms
Hide Adjustments
Activity Summary
Charges Payments No of Rx's
All 690.50 -200.00 7
YTD 690.50 -200.00 7
MTD 200.00 .00 2
View/Reprint
Cancel Entry
A/C History Print
Credit
View Entry in Detail
Print Payment Summary
Attendance History
Print A/C
Exit



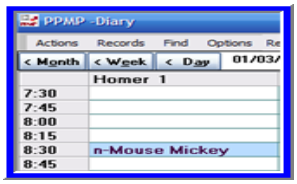
- Click Yes if you are sure you want to cancel this entry

Date	Description	Ref	GST	Debit
18/07/2013	PY500 - Initial Consultation	1		110.00
18/07/2013	EFT:$144.00 Med'l Fund ...	1		
19/07/2013	505 - Standard Consutation	1		90.00
22/07/2013	505 - Standard Consutation	1		90.00
24/07/2013	505 - Standard Consutation	1		90.00
02/08/2013	500 - Initial Consultation	1		110.50
06/09/2013	505 - Standard Consutation	1		90.00
26/09/2013	500 - CANCELLED : Initial...	1		
26/09/2013	Account printed. No 5.	ACT		
27/09/2013	500 - CANCELLED : Initial...	1		

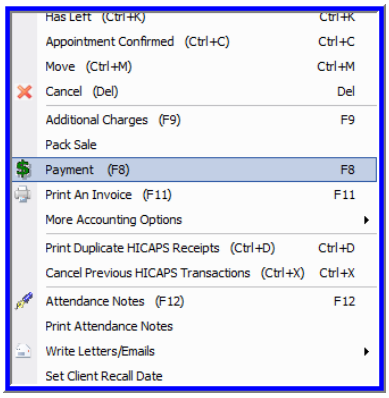
- The cancelled entry with now appear in the list.
  NB: Charges and Appointments cannot be removed from the diary due to auditing/security purposes – this will not affect reports, statistics etc.

13.2 Receipting a payment

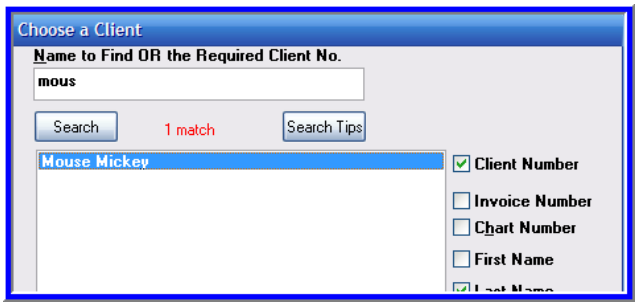
Click HERE to watch video



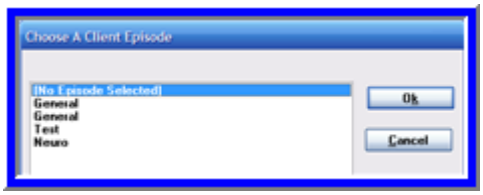
- If the client making the payment is already on the diary select that appointment.



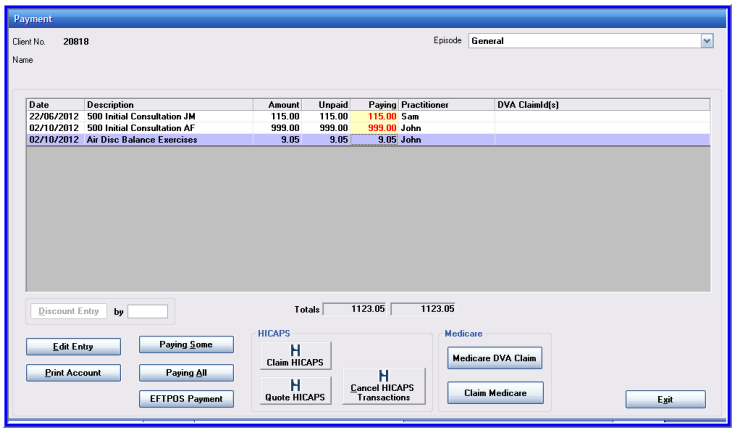
- Click Actions
- Click Payment



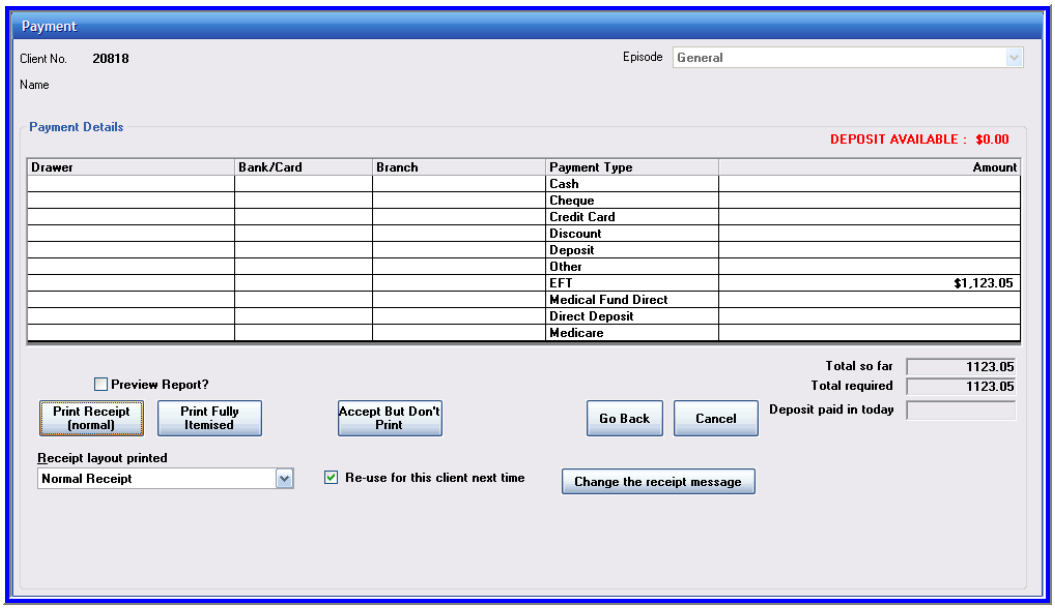
- If you didn't choose an appointment choose a patient from the patient list.



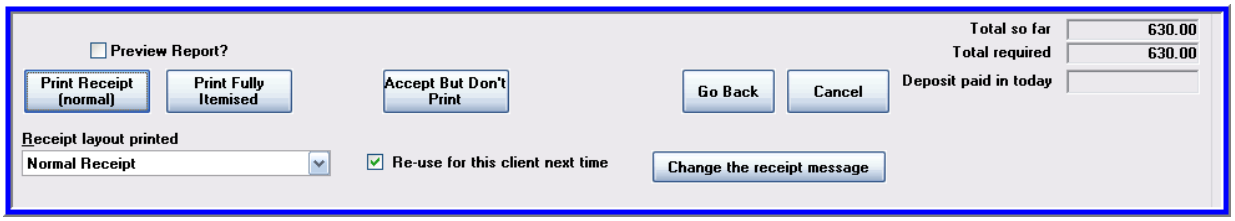
- If necessary choose the episode the payment is for



- Click Paying All (if total amount outstanding is being paid)
- Or Click in Paying field and type in amount being paid
- Click Paying Some



- Enter amounts being paid and how they paid



- Print a receipt (normal or fully itemised) if required
- Or accept but don't print

14 Class Packs

The class pack system is designed to automate the process of pre-selling a number of visits (usually but not necessarily a class of some kind), then using these up as the client attends, warning when they have run out, and to manage the payment for the class pack.

14.1 The Basics

You sell a pack to a client, as they attend; the system takes an unused pack item and puts it in the billing window. If accepted it is transferred to the used list.

If such a client has run out of pack items you will be asked if you wish to bill them for another pack before moving on to the usual charging window.

When you do bill a pack, you don't have to record a payment at that time, the payment can be done at any time just as for other charges. IE the pack doesn't have to be paid for to use items from it.
So that the program can tell if a client is using class packs, you set up one (or more) of your Payment Methods as a class pack Payment Method.

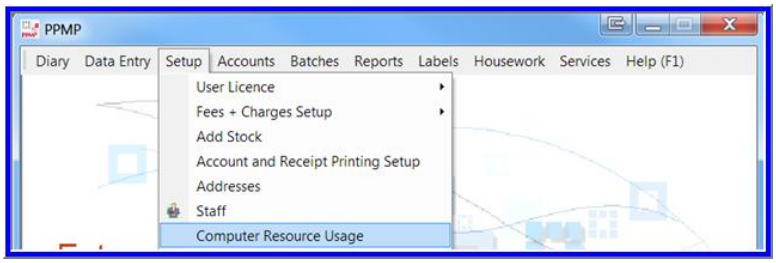
In the client's episode you select this Payment Method. The system will then expect to find unused pack items in the file, and if it doesn't find any it will ask you if you (optionally) want to sell them another one.

14.2 Setting Up

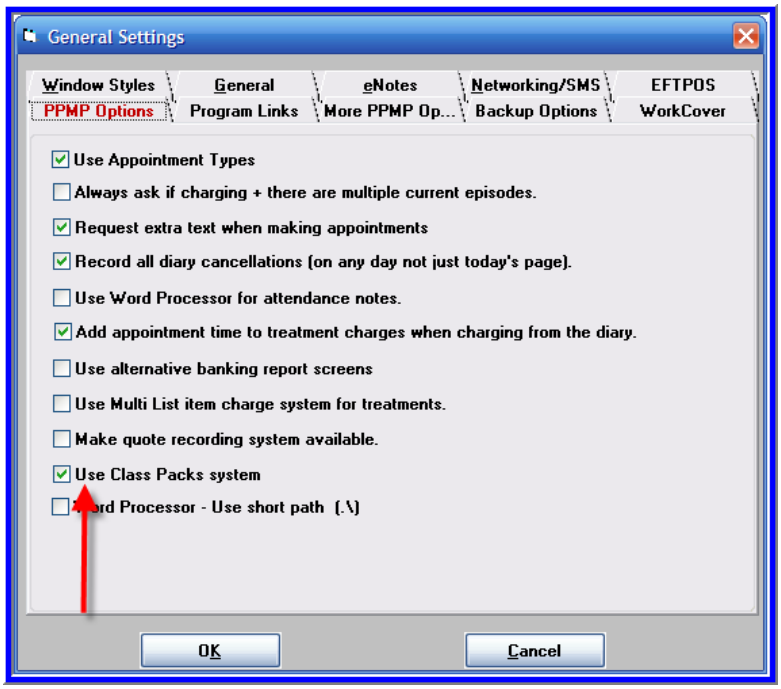
There are two parts to setting up.

Initializing the Class Packs

On the PPMP Main Menu

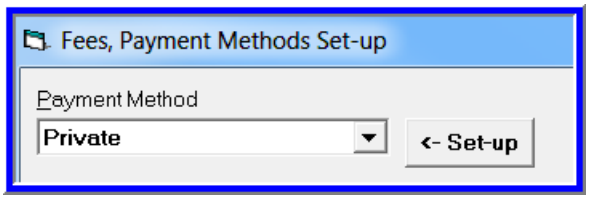


- Click Setup
- Computer Resource Usage

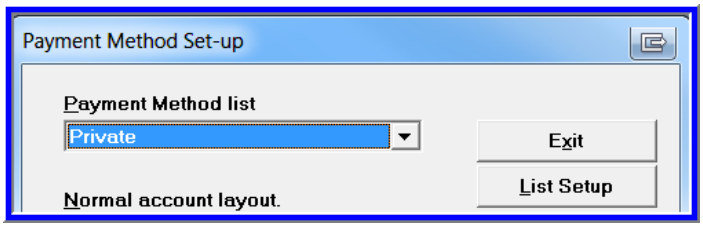

General Settings
Window Styles
General
eNotes
Networking/SMS
EFTPOS
PPMP Options
Program Links
More PPMP Op...
Backup Options
WorkCover
Use Appointment Types
Always ask if charging + there are multiple current episodes.
Request extra text when making appointments
Record all diary cancellations (on any day not just today's page).
Use Word Processor for attendance notes.
Add appointment time to treatment charges when charging from the diary.
Use alternative banking report screens
Use Multi List item charge system for treatments.
Make quote recording system available.
Use Class Packs system
rd Processor - Use short path (.\)
OK
Cancel

- Click PPMP Options
- Tick Use Class Packs System
- Click OK
- Close PPMP & Reopen
- Marking a Payment Method as a Class Pack Payment Method
- On the PPMP Main Menu

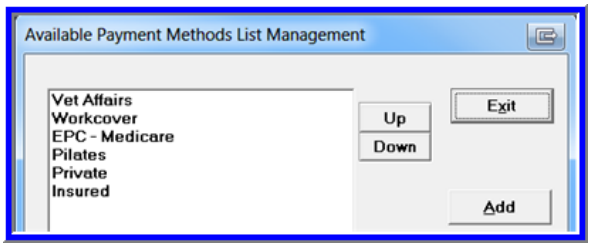
- Setup
- Fees + Charges setup
- Change the standard fees + charges.



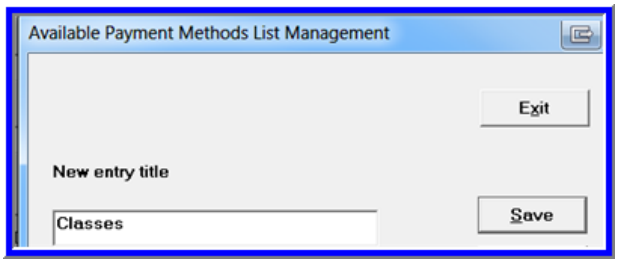
- Click on the Setup button beside the Payment Method List



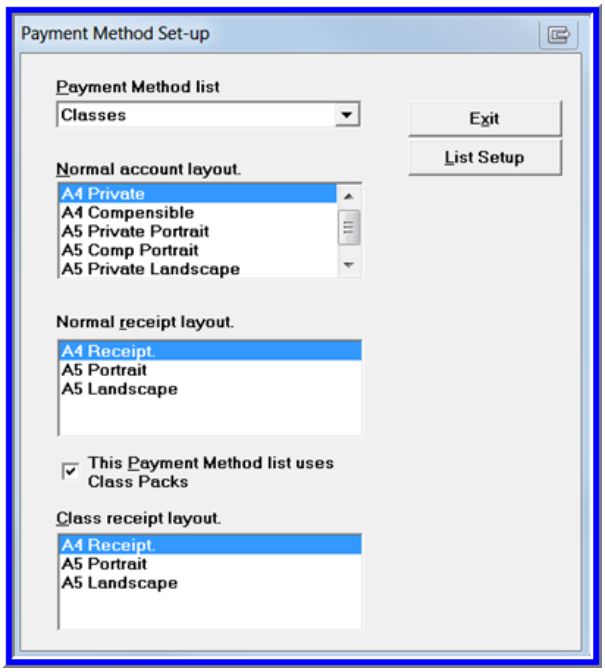
- Click on List Setup



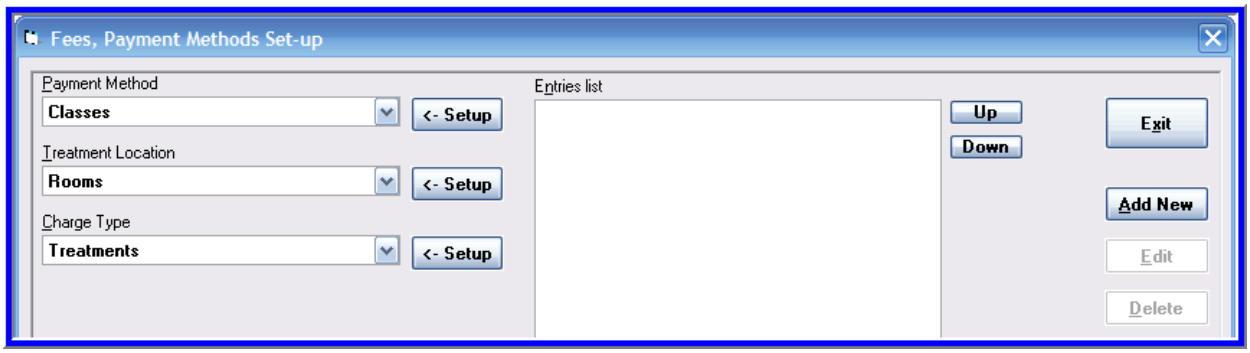
- Click Add



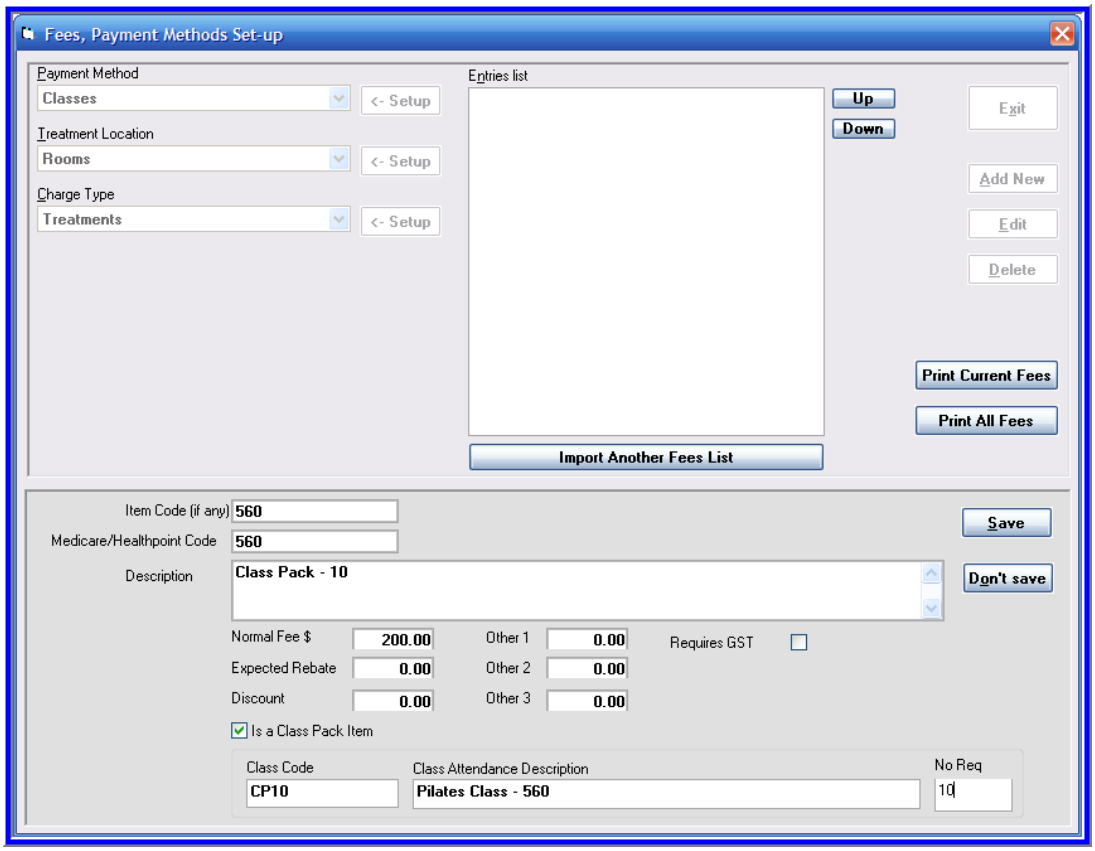
- Fill in the New Entry Title
- Click Save & Exit
- On the Payment Method Setup screen



- Select your class payment method
- Select the Account Layout
- Select the Receipt Layout
- Tick this Payment Method list uses Class Packs
- Select a Class Receipt layout
- Exit & Save changes



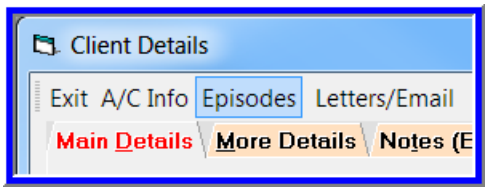
- Choose your Class Payment Method
- Click Add New



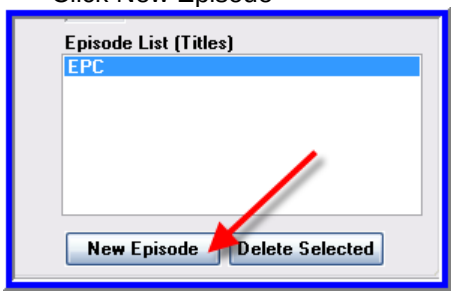
- Enter your Class Pack fees
- Tick is a Class Pack Item
- Fill in Class Attendance Description, Item Code & No. Required
- Click Save
- Continue until all Class Pack Items have been entered
- Click Exit

14.3 Before selling packs

You need to set up a new Episode for Class Packs



- Go to the Client's Episode screen
- Click New Episode



- Name the episode in Episode Title

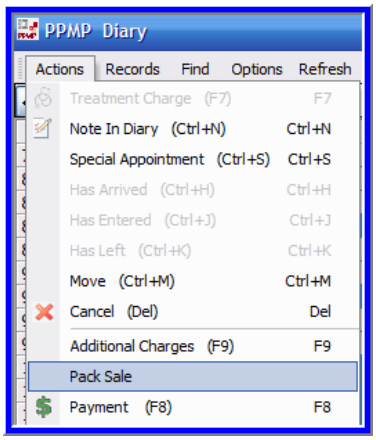
- Click Payment Methods and Select Class Payment Method
- Exit
- Save the Changes

You are now ready to sell a Pack

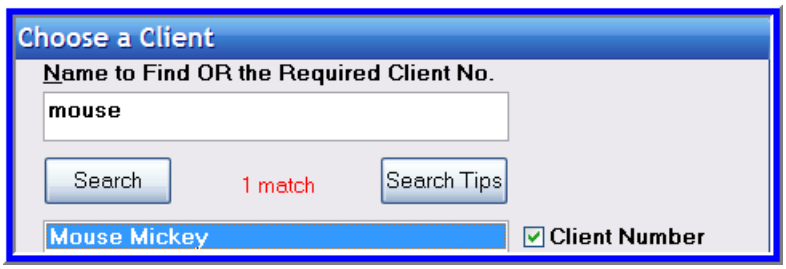
14.4 Selling packs

New Sale

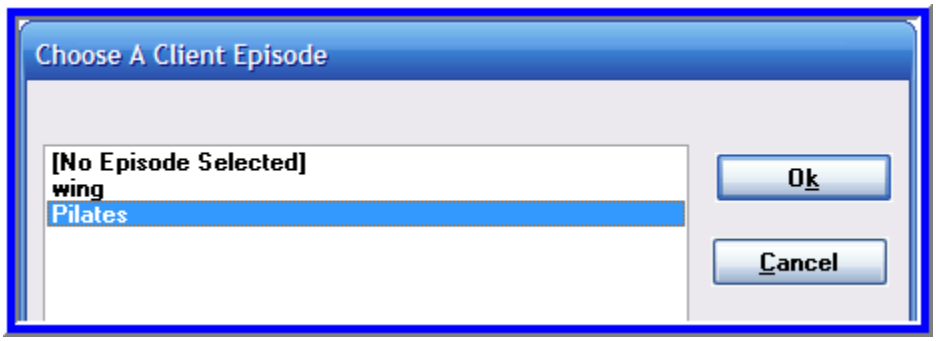
On a **BLANK SPOT** on the Diary



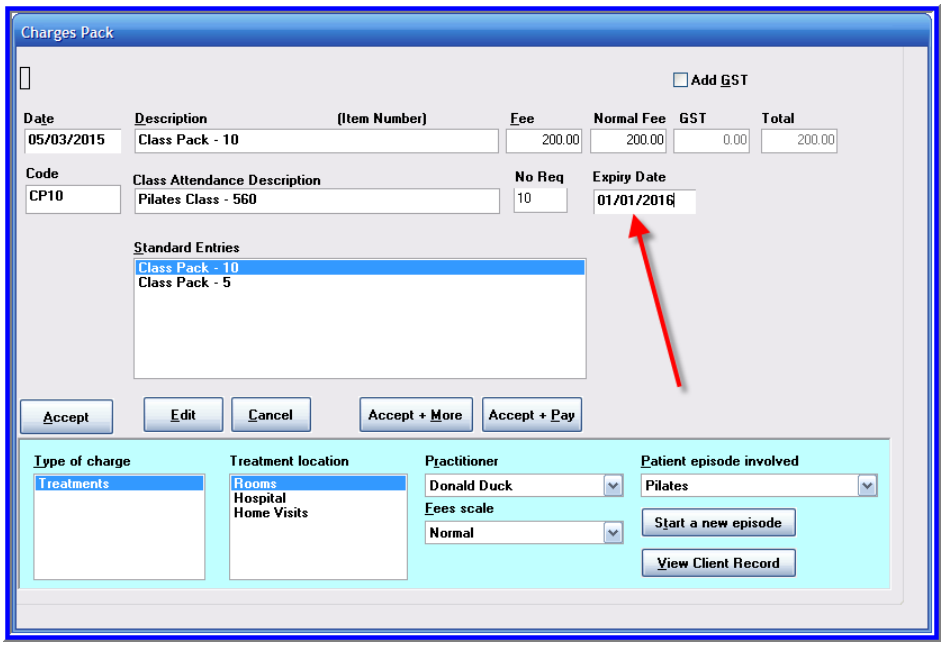
- Click Actions
- Pack Sale



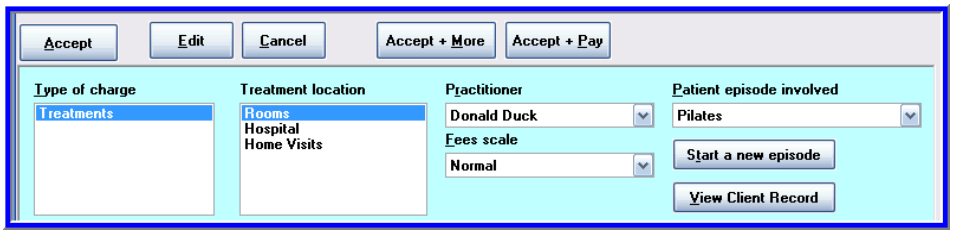
- Choose a Client
- Select the appropriate episode



- Click OK

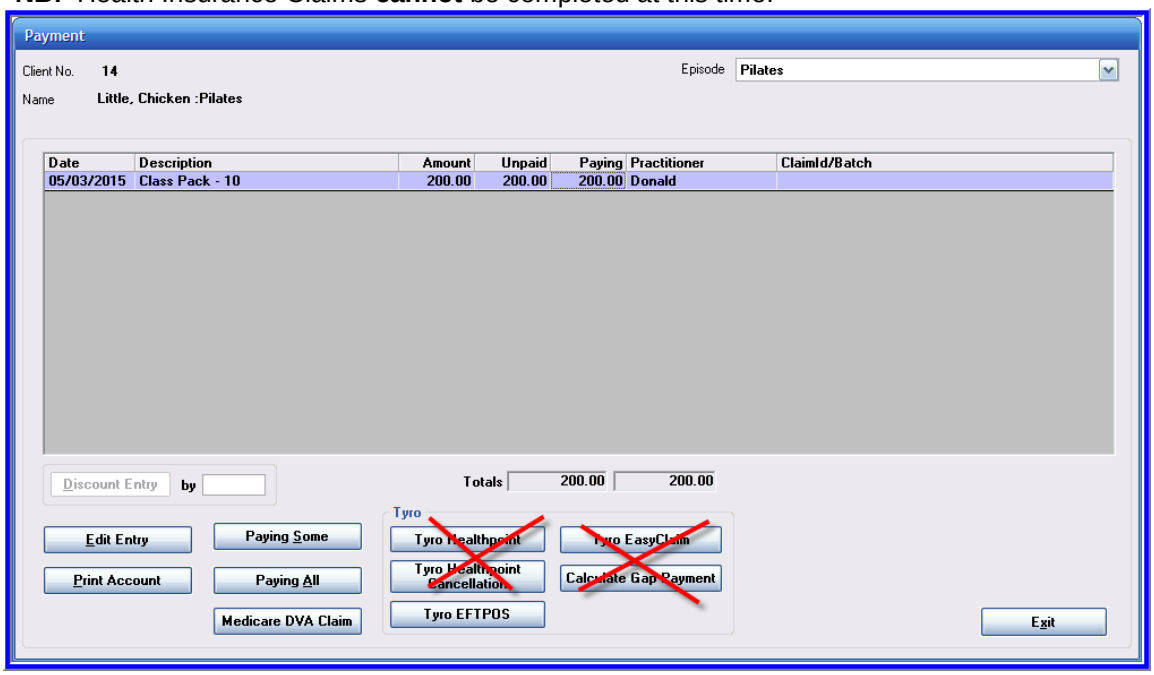


- Select the Pack from the available packs list.
- Enter an Expiry date (This is optional)



- Ensure all details are correct. **E.G.** Type of Charge, Location, Practitioner
- Click Accept or Accept+Pay
- Make Payment for the pack as you would normally take a payment

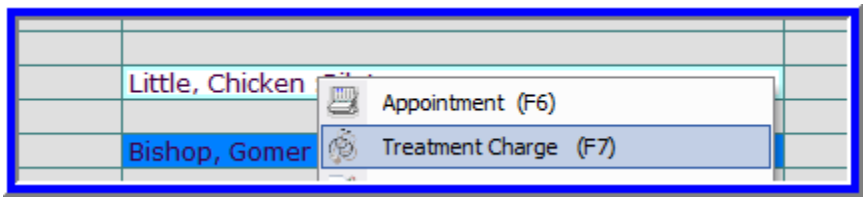
NB: Health Insurance Claims **cannot** be completed at this time.



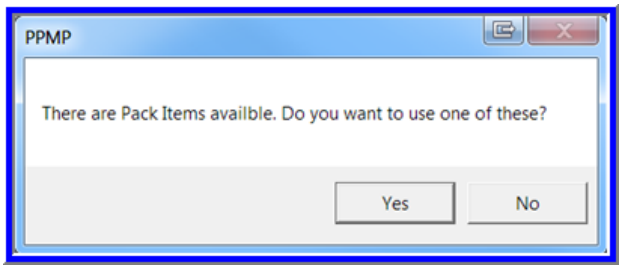
14.5 Using pack items

To use one of these items

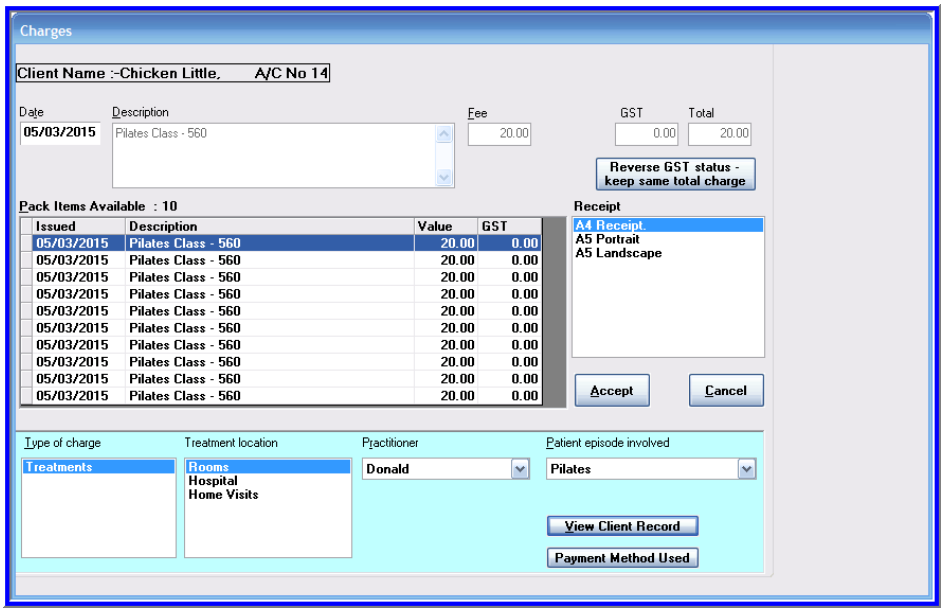
- Select client appointment on the diary (make sure the appointment has been made using the correct episode/payment method).



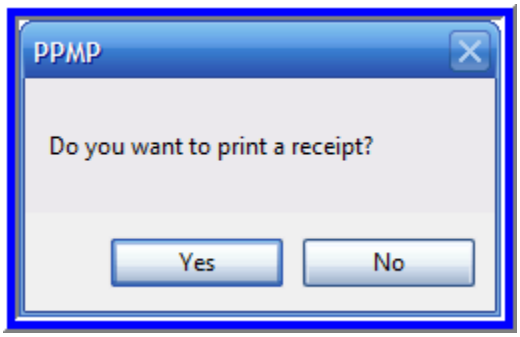
- Click Actions or Right Click
- Click Treatment Charge



- Click Yes



- A pack item from the clients file will be automatically entered into the charge window (the oldest on file will be selected).
- Click Accept

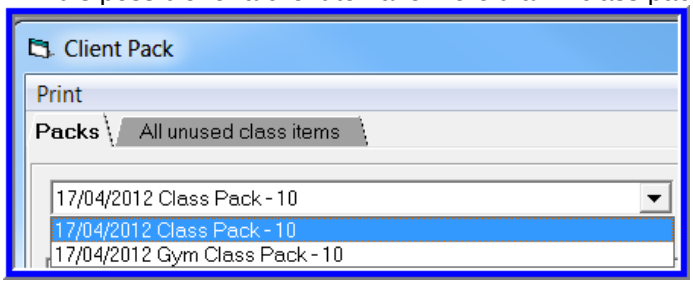


- **Click Yes**

(If you do not print the receipt now you will not be able to print later)

14.6 Using a different pack item

- It is possible for a client to have more than 1 class pack at any given time

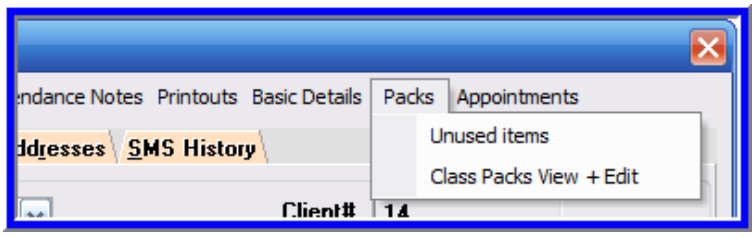


- If you want to use a particular unused pack item scroll down the Pack Item list and click on the particular item you want and click Accept

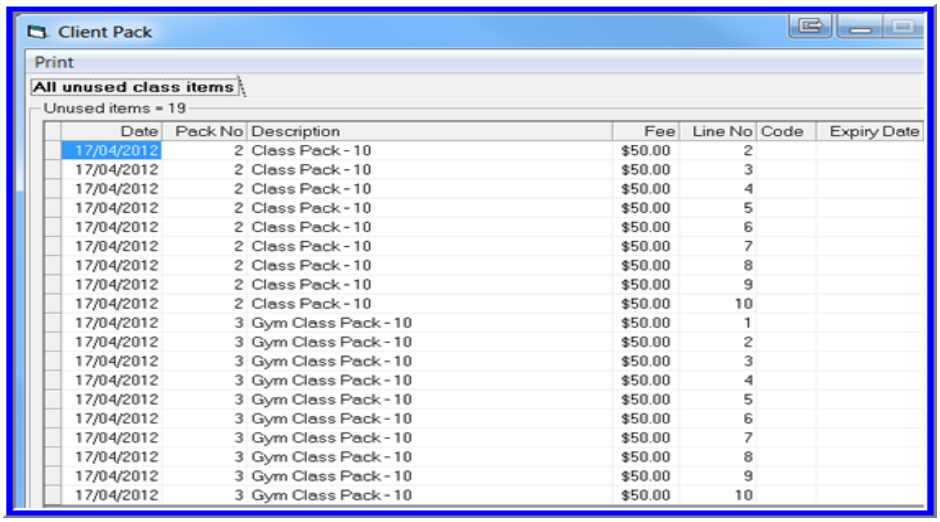
- You might need to do this where you have sold multiple packs such as normal Class and Gym class. The system might pre-load a normal class item when you want a Gym class item.

This would indicate that the appointment was made selecting the wrong episode

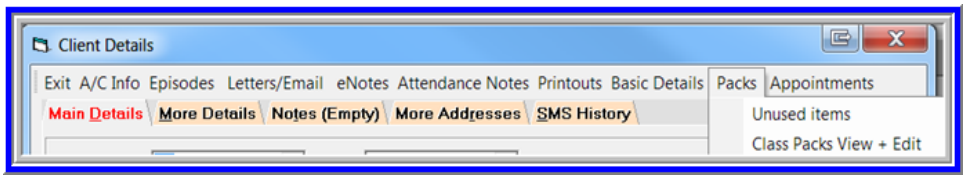
14.7 Viewing client usage & status



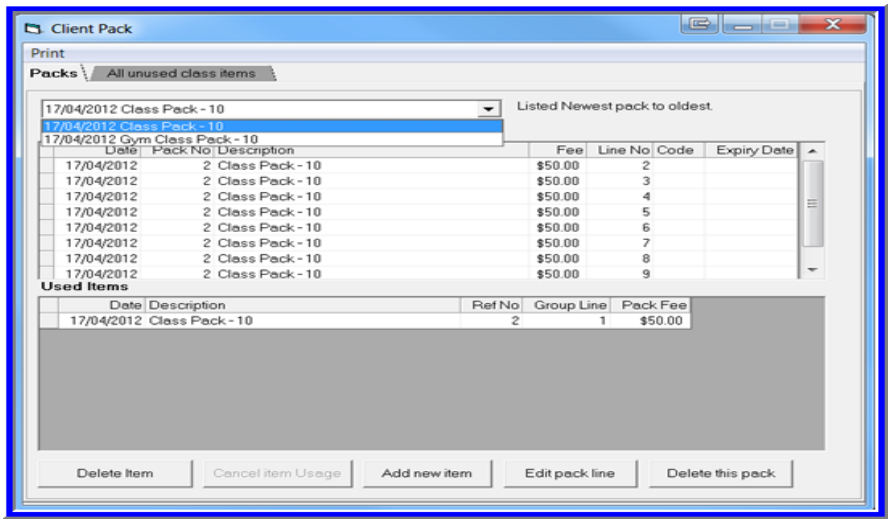
- Go to the client's record
- Click on Packs on the menu
- Choose "Unused items"



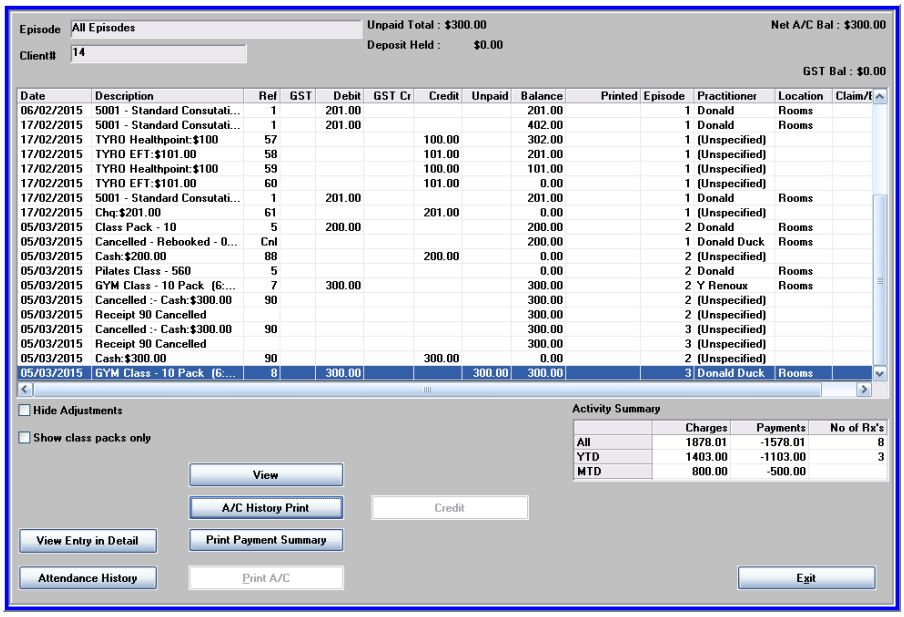
- Brings up all unused items available for use


Client Details
Exit A/C Info Episodes Letters/Email eNotes Attendance Notes Printouts Basic Details Packs Appointments
Main Details More Details Notes (Empty) More Addresses SMS History
Unused items
Class Packs View + Edit

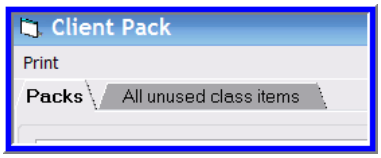
- Alternatively Click Class Packs View & Edit


Client Pack
Print
Packs All unused class items
17/04/2012 Class Pack - 10
17/04/2012 Class Pack - 10
17/04/2012 Gym Class Pack - 10
Listed Newest pack to oldest.
Date Pack No Description Fee Line No Code Expiry Date
17/04/2012 2 Class Pack - 10 $50.00 2
17/04/2012 2 Class Pack - 10 $50.00 3
17/04/2012 2 Class Pack - 10 $50.00 4
17/04/2012 2 Class Pack - 10 $50.00 5
17/04/2012 2 Class Pack - 10 $50.00 6
17/04/2012 2 Class Pack - 10 $50.00 7
17/04/2012 2 Class Pack - 10 $50.00 8
17/04/2012 2 Class Pack - 10 $50.00 9
Used Items
Date Description Ref No Group Line Pack Fee
17/04/2012 Class Pack - 10 2 1 $50.00
Delete Item
Cancel item Usage
Add new item
Edit pack line
Delete this pack

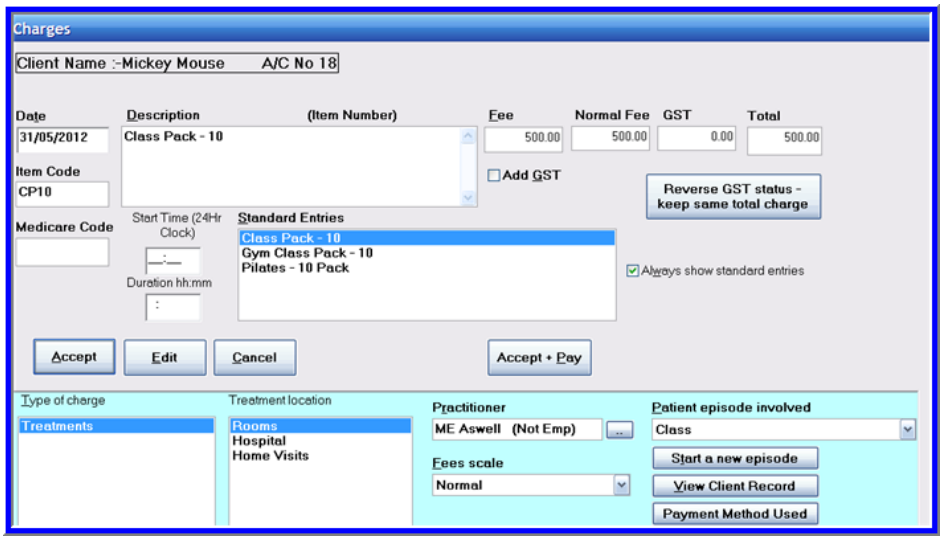
- You have full access to all the packs and be able to adjust or change them


Episode All Episodes
Client# 14
Unpaid Total : $300.00
Deposit Held : $0.00
Net A/C Bal : $300.00
GST Bal : $0.00
Date Description Ref GST Debit GST Cr Credit Unpaid Balance Printed Episode Practitioner Location
06/02/2015 5001 - Standard Consultati... 1 201.00 201.00 1 Donald Rooms
17/02/2015 5001 - Standard Consultati... 1 201.00 402.00 1 Donald Rooms
17/02/2015 TYRO Healthpoint:$100 57 100.00 302.00 1 (Unspecified)
17/02/2015 TYRO EFT:$101.00 58 101.00 201.00 1 (Unspecified)
17/02/2015 TYRO Healthpoint:$100 59 100.00 101.00 1 (Unspecified)
17/02/2015 TYRO EFT:$101.00 60 101.00 0.00 1 (Unspecified)
17/02/2015 5001 - Standard Consultati... 1 201.00 201.00 1 Donald Rooms
17/02/2015 Chq:$201.00 61 201.00 0.00 1 (Unspecified)
05/03/2015 Class Pack - 10 5 200.00 200.00 2 Donald Rooms
05/03/2015 Cancelled - Rebooked - 0... Cnl 200.00 1 Donald Duck Rooms
05/03/2015 Cash:$200.00 88 200.00 0.00 2 (Unspecified)
05/03/2015 Pilates Class - 560 5 0.00 2 Donald Rooms
05/03/2015 GYM Class - 10 Pack (6:... 7 300.00 300.00 2 Y Renoux Rooms
05/03/2015 Cancelled :- Cash:$300.00 90 300.00 2 (Unspecified)
05/03/2015 Receipt 90 Cancelled 300.00 2 (Unspecified)
05/03/2015 Cancelled :- Cash:$300.00 90 300.00 3 (Unspecified)
05/03/2015 Receipt 90 Cancelled 300.00 3 (Unspecified)
05/03/2015 Cash:$300.00 90 300.00 0.00 2 (Unspecified)
05/03/2015 GYM Class - 10 Pack (6:... 8 300.00 300.00 300.00 3 Donald Duck Rooms
Hide Adjustments
Show class packs only
Activity Summary
Charges Payments No of Rx's
All 1878.01 -1578.01 8
YTD 1403.00 -1103.00 3
MTD 800.00 -500.00
View
A/C History Print
Credit
View Entry in Detail
Print Payment Summary
Attendance History
Print A/C
Exit

- Or you can go to a client's Account history screen
- Click on a pack item
- Click the View button
- You will be taken to the Client Pack screen where you can make adjustments or edit pack information



- The Tabs at the top "Packs" / "All unused class items" shows you all pack items and what is still available
- When a Class Pack is Finished
- When a client is on a Pack Item Payment Method and there are no unused pack items in their file



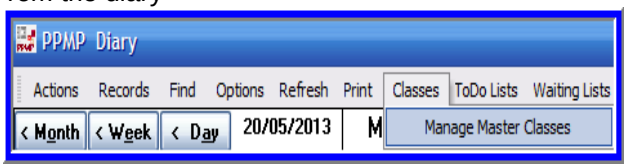
As you try to treatment charge, a new class pack will be available to select

HIGHLY RECOMMENDED TO CANCEL – and sell the pack through the Pack Sale option – Actions or right click on a blank spot – otherwise the name on diary will change color (because it has been charged) and you will not be able to use an item from the pack.

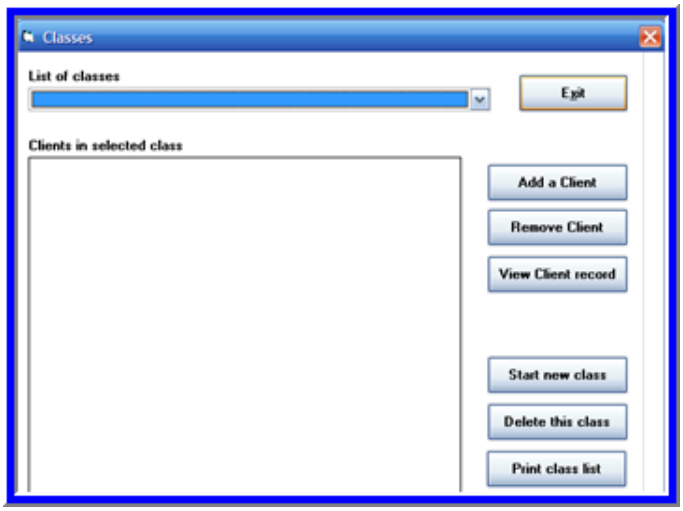
And after the sale return to the Diary and charge as usual

14.8 Classses – Setup new class

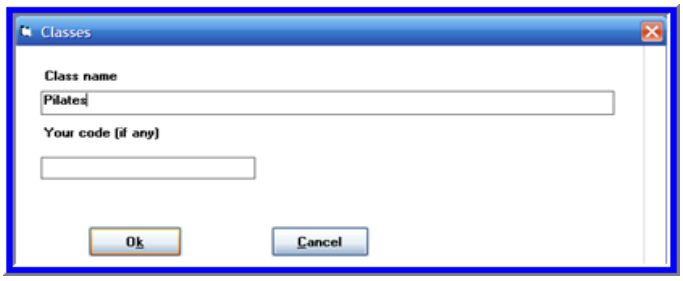
From the diary



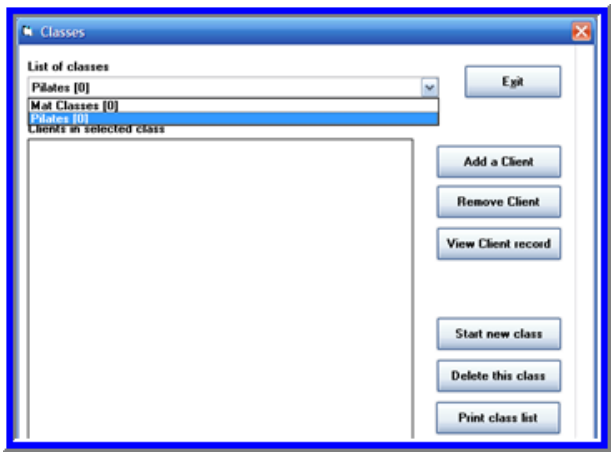
- Click Classes
- Manage Master Classes



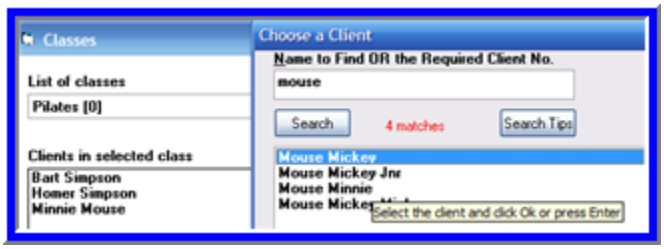
- Click Start New Class



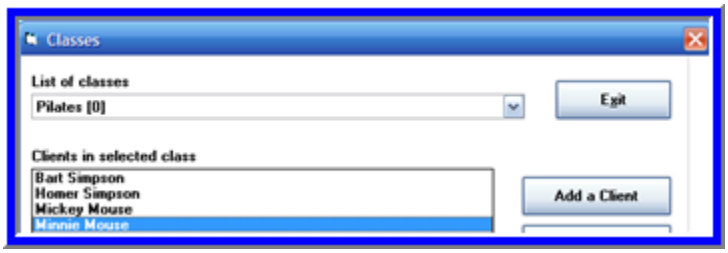
- Give Class a Name – Click OK



- Click on Drop Down button and select Class
- Click Add a Client



- Select Client & Click OK

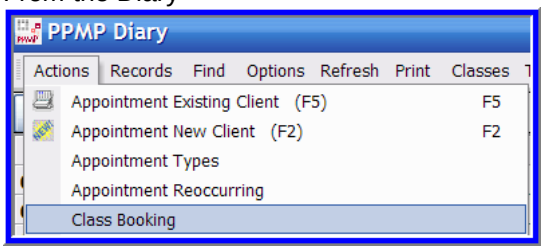


- When you have finished adding clients - Click Exit

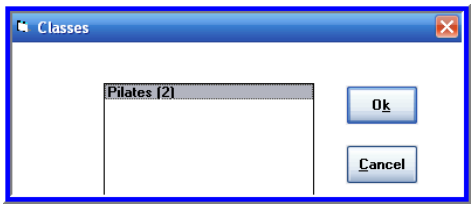
14.9 Classes – Make class appointments

NB: When making changes to classes a new class will be added – this is so people can be added and removed from a class on a particular day instead of having to delete and add back into future classes

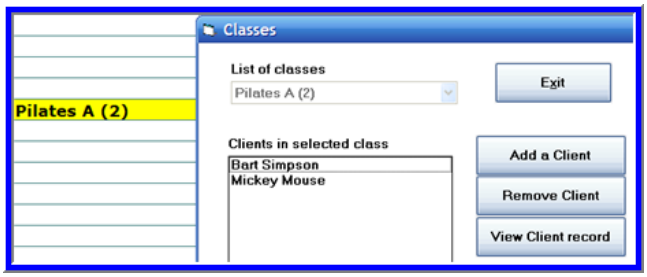
From the Diary



- Click Actions (or Right Click on the diary)
- Select Class Booking



- Select the class
- Click OK

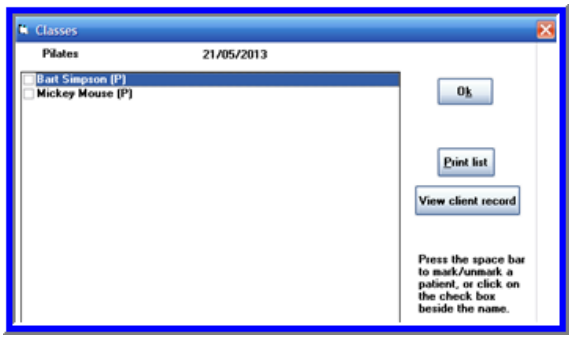


- The number in brackets indicates how many people are in the class

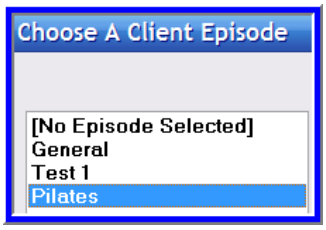
14.10 Classes - Treatment charges

- Highlight class – the number indicates how many booked in the class

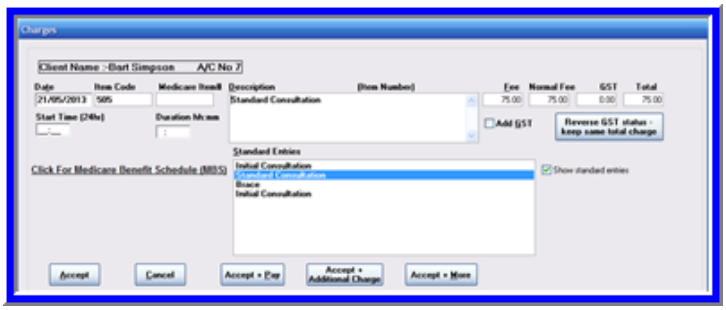
- Click Actions or Right Click
- Click Treatment Charge



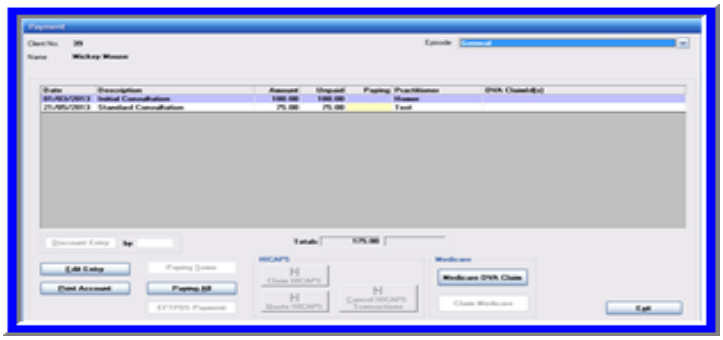
- Click in the box next to name



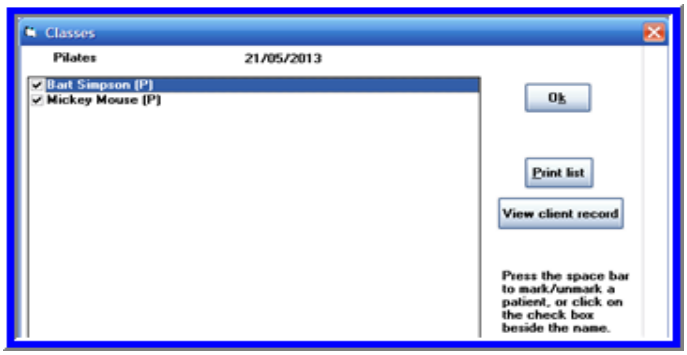
- Select episode (if prompted)



- Click Accept

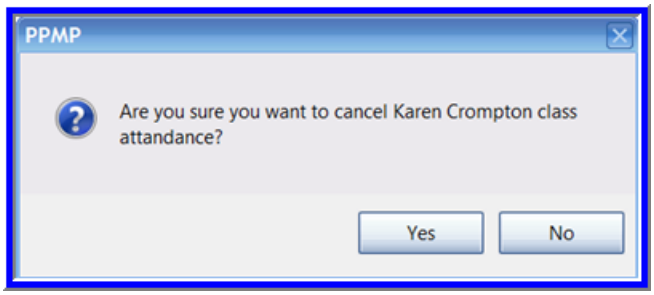


- Proceed with Payment as usual (if not paying Click Exit)



- Repeat until all class attendees have been treatment charged
- Click OK

NB: If you need to cancel a treatment simply click on the tick next to their name



- Click Yes
- The charge has now been removed from their account information.

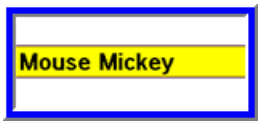
15 Client records on PPMP

15.1 Adding a new client to the computer

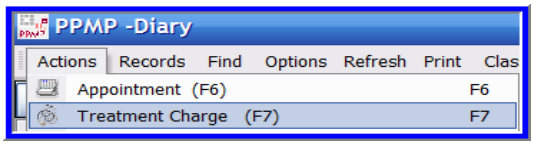
Click HERE to watch video

A new client can be added to the system in four ways.
This is the most common approach, (the program detects that they are a new patient and requires their details to be entered before continuing)

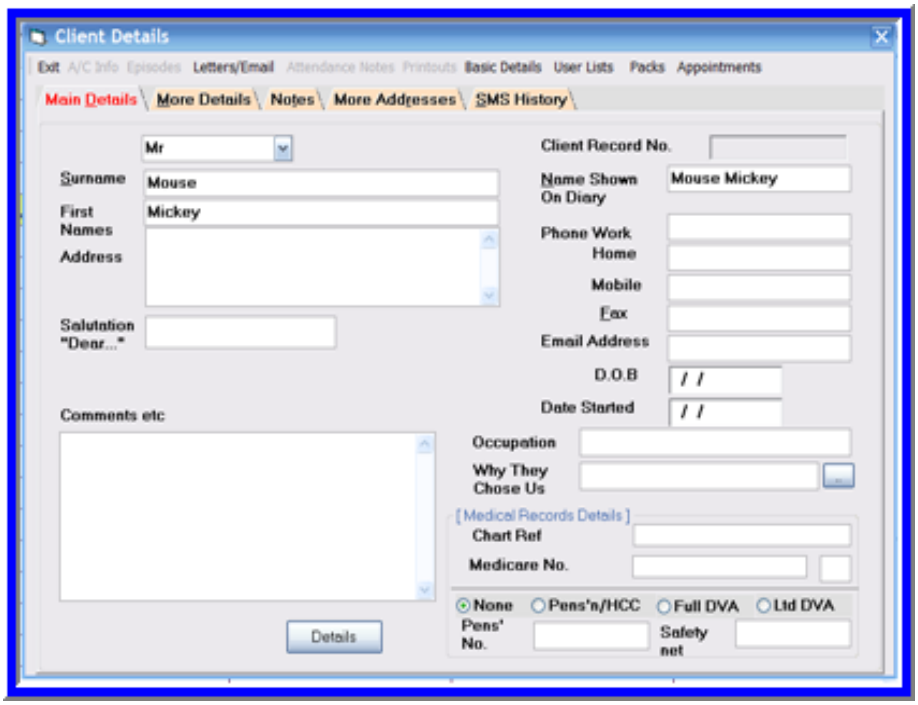
The First Option



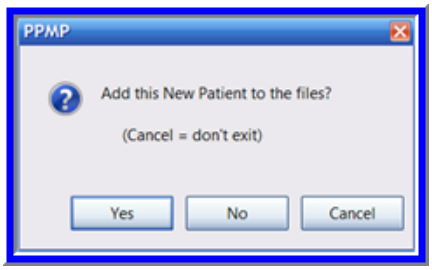
- Click on the appointment for a new client on the diary



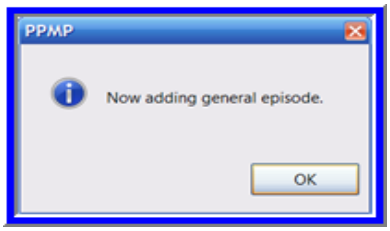
- Click Actions
- Click Treatment Charge



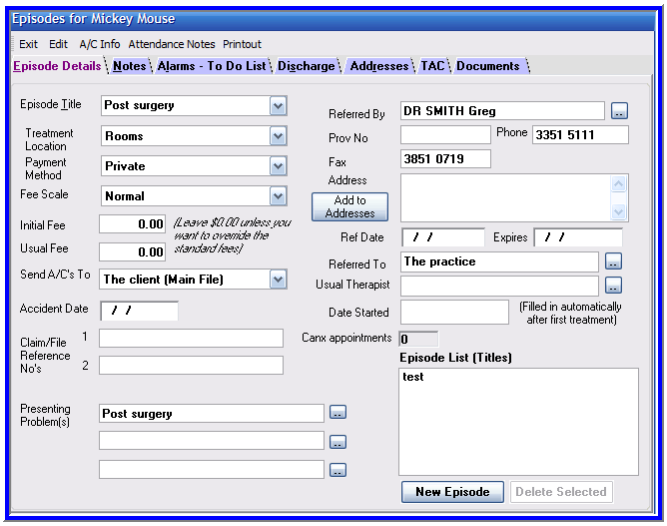
- Fill in client details (see – Entering Client Details below)
- Click Exit



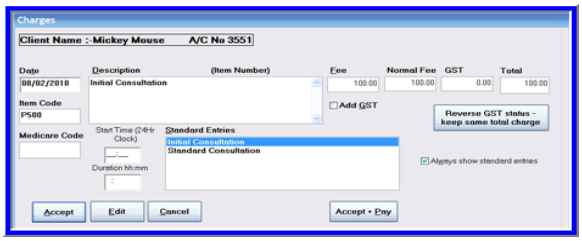
- Click Yes



- Click OK



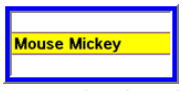
- Fill in the episode details
- Click exit
- Save the changes



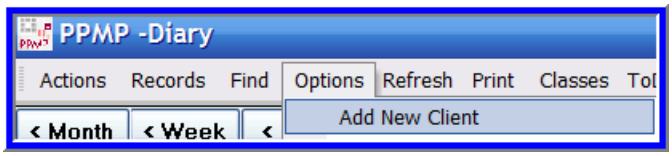
- Proceed with the treatment charge

<u>The Second Option</u>

This approach is used when you want to fill in the new patient's details before you record their first treatment or are ready to make another appointment for them.



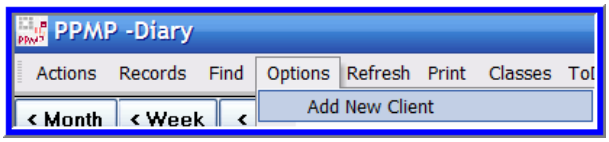
- Selecting the New Patient's appointment on the diary.



- Click on Options
- Click Add a New Client
- Proceed as in Option 1

The Third Option

Without selecting a new patient's appointment.
From the diary

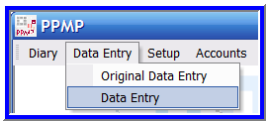


- Click Options
- Click Add a New Client
- This brings up the Client Details screen
- Proceed as in Option 1

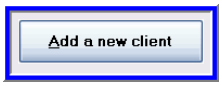
The Fourth Option

Add a New Client Using Data Entry system

- On the Main Menu PPMP®



- Click Data Entry
- Click Data Entry



- Select Add New Client
- Enter the Client details
- You normally don't add a new client until the new client actually turns up for their visit, to avoid having client files for clients who never actually attended

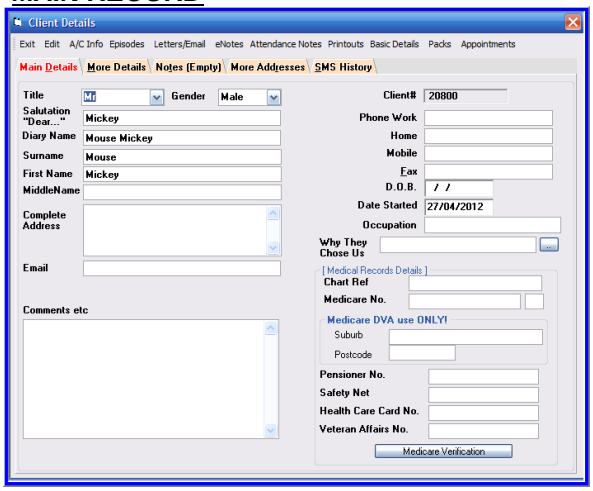
NB: You can't record a treatment or make a subsequent appointment without adding the patient to the patient file. You only need to fill in client's name to proceed – you can then go back and fill in other necessary information.

15.2 Entering client details

Click HERE to watch video

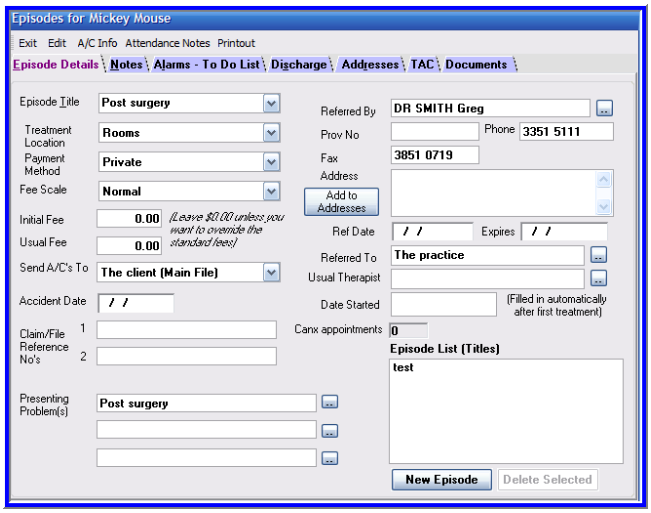
The information on a client is divided into three main sections.

MAIN RECORD



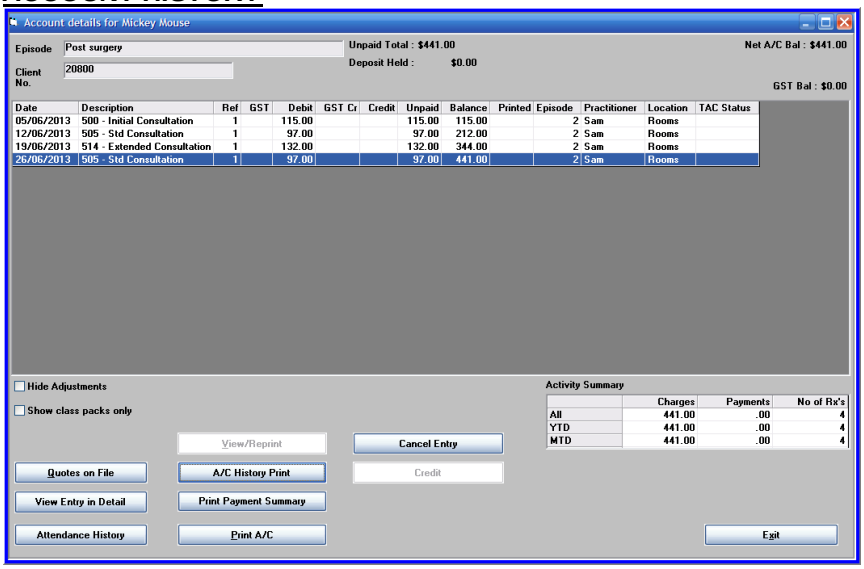
- Their main Client Details such as Name, Address, DOB. Contact phone numbers, etc.

EPISODES



- Details of a particular problem what they are being treated for. Such as what the problem is, who referred them, payment method, treatment location, fees scale used, claim numbers, notes, etc.

ACCOUNT HISTORY


Account details for Mickey Mouse
Episode Post surgery
Client No. 20800
Unpaid Total : $441.00
Deposit Held : $0.00
Net A/C Bal : $441.00
GST Bal : $0.00
Date Description Ref GST Debit GST Cr Credit Unpaid Balance Printed Episode Practitioner Location TAC Status
05/06/2013 500 - Initial Consultation 1 115.00 115.00 115.00 2 Sam Rooms
12/06/2013 505 - Std Consultation 1 97.00 97.00 212.00 2 Sam Rooms
19/06/2013 514 - Extended Consultation 1 132.00 344.00 2 Sam Rooms
26/06/2013 505 - Std Consultation 1 97.00 97.00 441.00 2 Sam Rooms
Hide Adjustments
Show class packs only
Activity Summary
Charges Payments No of Rx's
All 441.00 .00 4
YTD 441.00 .00 4
MTD 441.00 .00 4
View/Reprint
Cancel Entry
Quotes on File
A/C History Print
Credit
View Entry in Detail
Print Payment Summary
Attendance History
Print A/C
Exit

- Attendance records along with charges levied and payments received.
- Each client has only one main record, but they might over time accumulate several different episodes.
- Each entry in their account history is associated with one and only one of the episodes.
- You can have more than one patient episode active for a patient at the same time.
- Each episode is handled separately as far as issuing accounts and receipts is concerned.
- They might have a private episode and a Compensable episode being treated and billed simultaneously.

It pays to fill in the Client Records.

GET INTO THE HABIT OF FILLING IN THE PATIENTS ADDRESS IMMEDIATELY.

Most practices find in the long term that it pays to fill in all relevant information (you only have to do it for the patient's first visit) further down the track you may want to take advantage of the reporting capabilities of the system, but they are dependent on the information you have entered.

You will find it frustrating if you use the automatic print accounts option only to find many of them don't have an address on them.

Client Details
Exit A/C Info Episodes Letters/Email Attendance Notes Printouts Basic Details User Lists
Packs Appointments

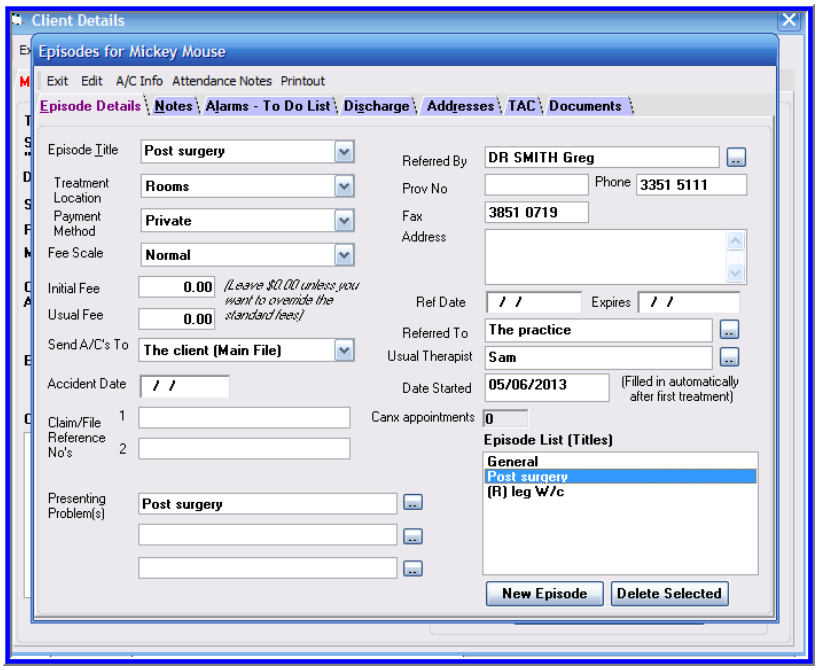
- Client's main record screen

Client Details
Exit A/C Info Episodes Letters/Email Attendance Notes Printouts Basic Details User Lists
Packs Appointments
Main Details More Details Notes (Empty) More Addresses

- There are several pages to record extra information like names and other addresses, notes, etc.

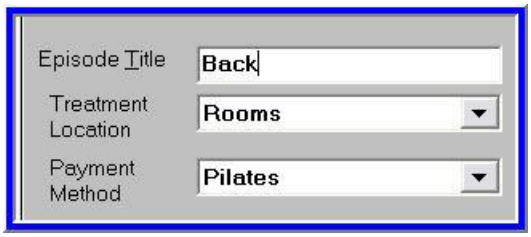
You can also access the patient's episode details and account history from here.

15.3 Client episode details


Client Details
Episodes for Mickey Mouse
Exit Edit A/C Info Attendance Notes Printout
Episode Details Notes Alarms - To Do List Discharge Addresses TAC Documents
Episode Title Post surgery
Treatment Location Rooms
Payment Method Private
Fee Scale Normal
Initial Fee 0.00
Usual Fee 0.00
(Leave $0.00 unless you want to override the standard fees)
Send A/C's To The client (Main File)
Accident Date / /
Claim/File Reference No's 1 2
Presenting Problem(s) Post surgery
Referred By DR SMITH Greg
Prov No
Phone 3351 5111
Fax 3851 0719
Address
Ref Date / / Expires / /
Referred To The practice
Usual Therapist Sam
Date Started 05/06/2013
(Filled in automatically after first treatment)
Canx appointments 0
Episode List (Titles)
General
Post surgery
(R) leg W/c
New Episode
Delete Selected

- The client episode details window

- Each time a client attends for treatment for a new problem, you should start a new EPISODE for them.
- Each episode has a title, typically the problem being treated, and its own set of details. (e.g. Payment method, Treatment location, Fees scale, Presenting problems, Claim numbers, Date of accident, Send accounts to setting, Referred by & usual practitioner.)



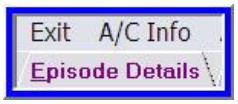
- You don't have to fill in all of these entries, just those of interest to you apart from an episode title & the payment method & treatment location.

- There is also a provision for notes.

15.4 To start a new episode

- Click on Start a New episode

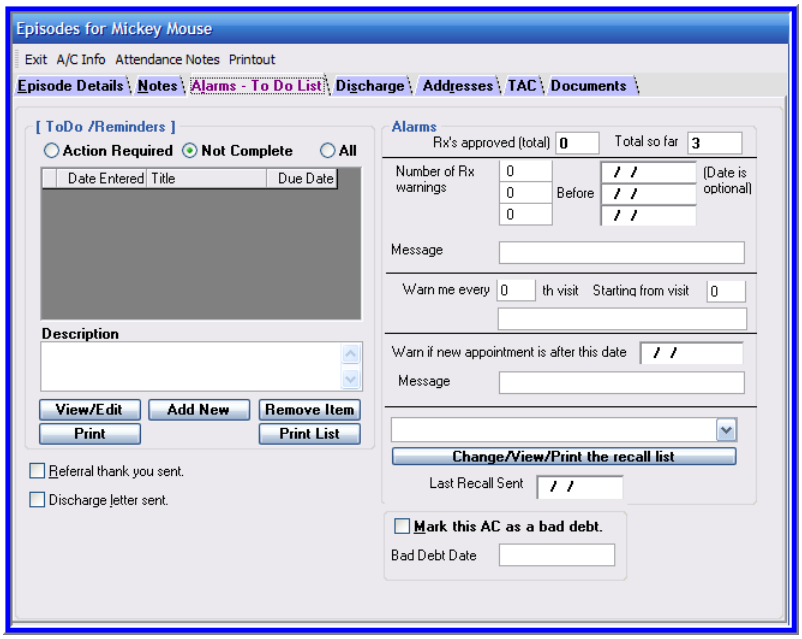
- **Episode title -** Use a title so that when the client has been for more than one problem you can easily identify which is which.



- If you click the Account information button here, you will only see the account history entries that relate to the currently displayed episode.

Initial and standard fees.

NB: These should be left $0.00 unless you want a special fee charged on a regular basis for this particular patient, which isn't already covered by your standard fees.

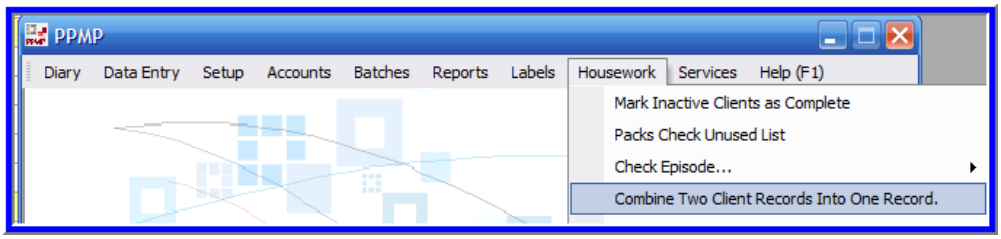

Episodes for Mickey Mouse
Exit A/C Info Attendance Notes Printout
Episode Details Notes Alarms - To Do List Discharge Addresses TAC Documents
[ToDo /Reminders]
Action Required Not Complete All
Date Entered Title Due Date
Description
View/Edit Add New Remove Item
Print Print List
Referral thank you sent.
Discharge letter sent.
Alarms
Rx's approved (total) 0 Total so far 3
Number of Rx warnings 0 0 0
Before / / / / / /
(Date is optional)
Message
Warn me every 0 th visit Starting from visit 0
Warn if new appointment is after this date / /
Message
Change/View/Print the recall list
Last Recall Sent / /
Mark this AC as a bad debt.
Bad Debt Date

- **Alarms By number of treatments** - If you enter a number of approved treatments, the client's appointments will display in a different color with a number in brackets – this number indicates the amount of treatments left before they reach their approved number of treatments.
- If you also include a date then the number of treatments must occur by this date.

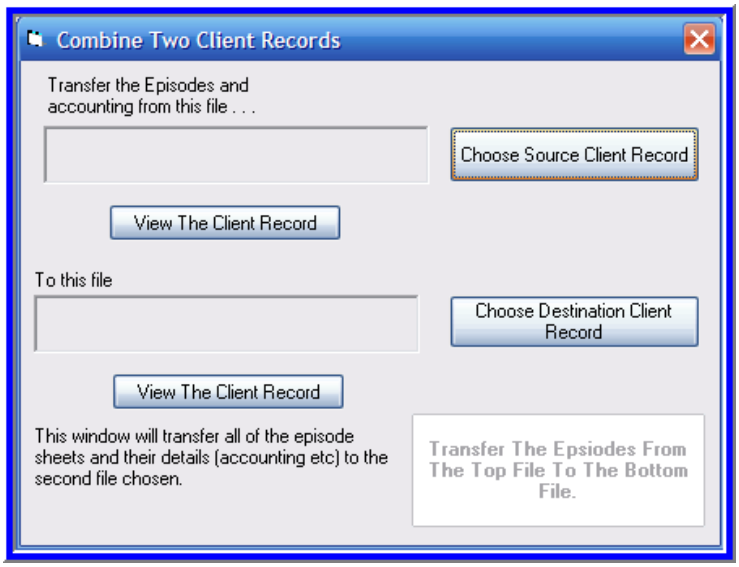
- The appointment alarm window will appear when appointments are made after this date and the client's name will show up on a red background when an appointment for them is made on the diary.

16 Combine 2 client records into one

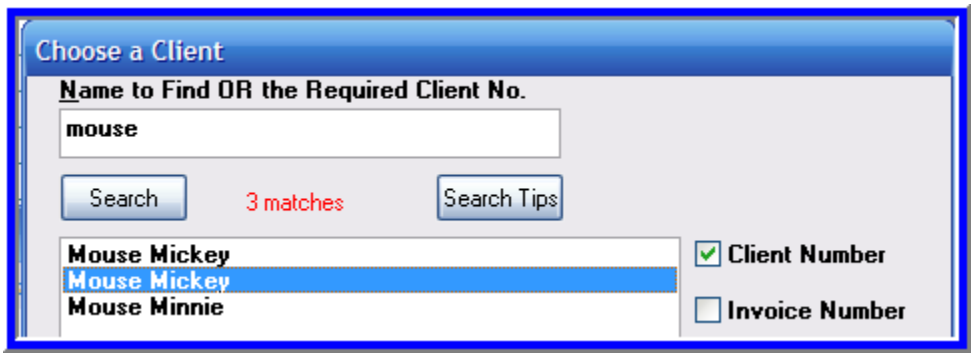
On PPMP Main Screen



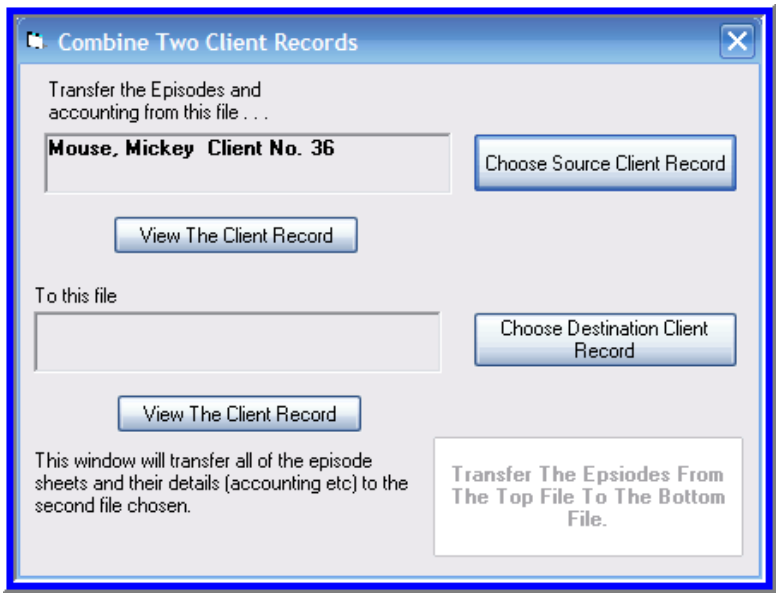
- Go to Housework
- Click on Combine Two Clients Records into One Record


Combine Two Client Records
Transfer the Episodes and accounting from this file . . .
Choose Source Client Record
View The Client Record
To this file
Choose Destination Client Record
View The Client Record
This window will transfer all of the episode sheets and their details (accounting etc) to the second file chosen.
Transfer The Epsiodes From The Top File To The Bottom File.

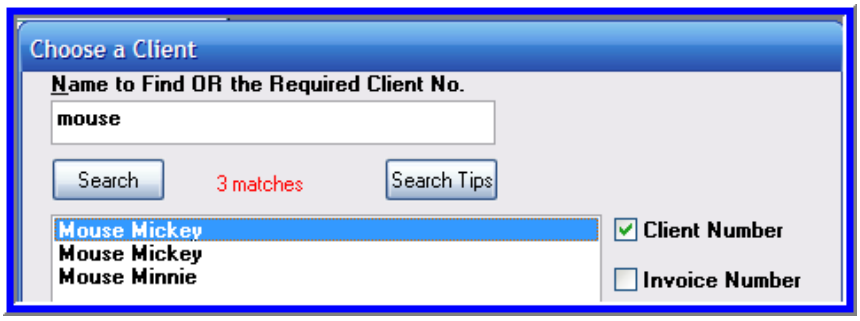
- Click on Choose Source Client Record



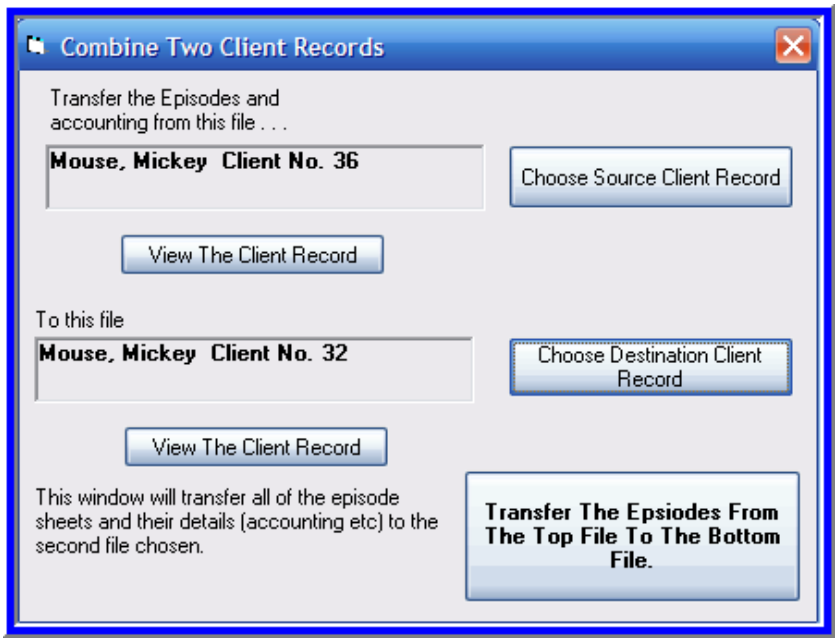
- Select the file to transfer **FROM**


Combine Two Client Records
Transfer the Episodes and accounting from this file . . .
Mouse, Mickey Client No. 36
Choose Source Client Record
View The Client Record
To this file
Choose Destination Client Record
View The Client Record
This window will transfer all of the episode sheets and their details (accounting etc) to the second file chosen.
Transfer The Epsiodes From The Top File To The Bottom File.

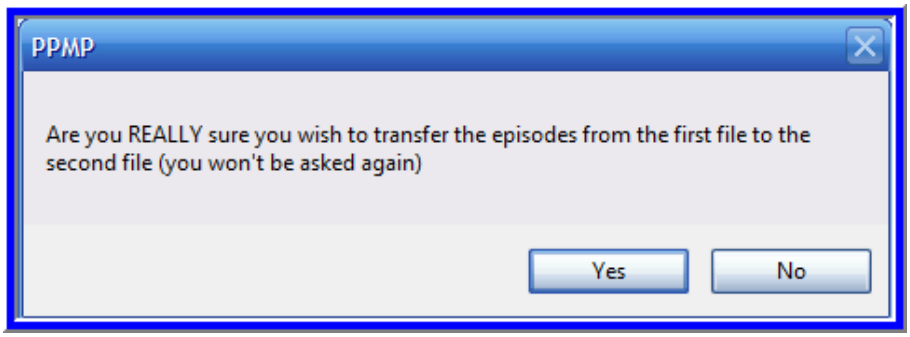
- Click Choose Destination Client Record



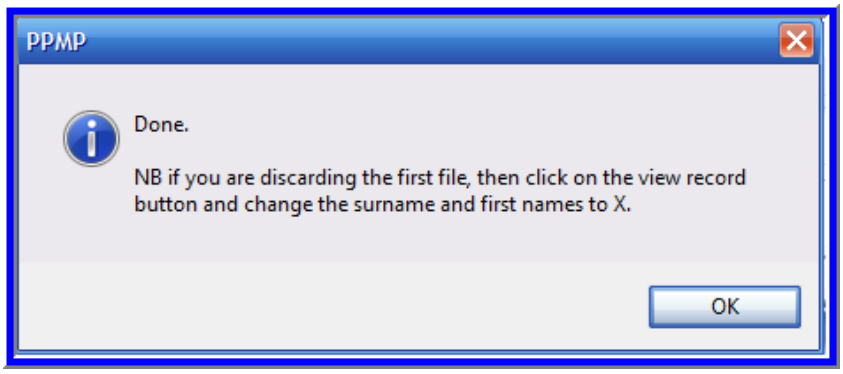
- Select the file to transfer **TO**


Combine Two Client Records
Transfer the Episodes and accounting from this file . . .
Mouse, Mickey Client No. 36
Choose Source Client Record
View The Client Record
To this file
Mouse, Mickey Client No. 32
Choose Destination Client Record
View The Client Record
This window will transfer all of the episode sheets and their details (accounting etc) to the second file chosen.
Transfer The Epsiodes From The Top File To The Bottom File.

- Click Transfer the Episodes **FROM THE TOP FILE** to **THE BOTTOM FILE**
- Make sure you have selected the <u>correct files</u>


PPMP
Are you REALLY sure you wish to transfer the episodes from the first file to the second file (you won't be asked again)
Yes
No

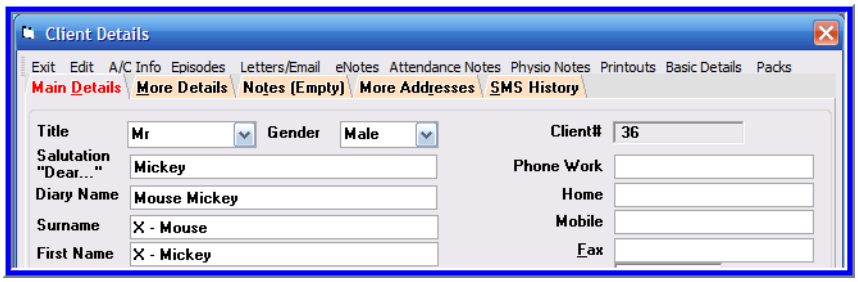
- Click Yes if you are sure (**ONLY IF YOU ARE VERY SURE** – this stage cannot be reversed)


PPMP
Done.
NB if you are discarding the first file, then click on the view record button and change the surname and first names to X.
OK

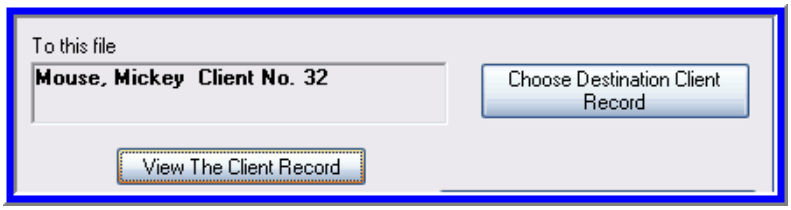
- Click OK

Combine Two Client Records
Transfer the Episodes and accounting from this file . . .
Mouse, Mickey Client No. 36
Choose Source Client Record
View The Client Record

- Click on View the Client Record

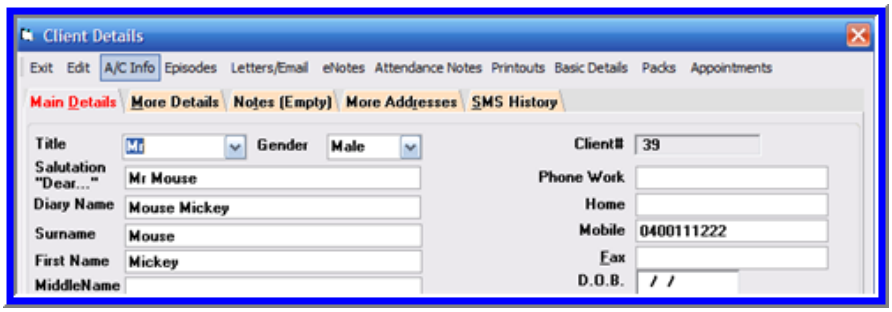


- Insert X before Surname/Firstname (you can remove the surname/firstname and just leave X)
- Click Exit and Save Changes

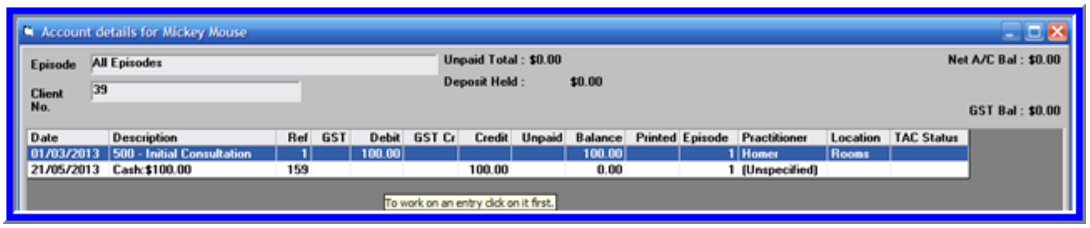


- View the Destination Record (to make sure Episode and Accounting Information is correct)
- Exit

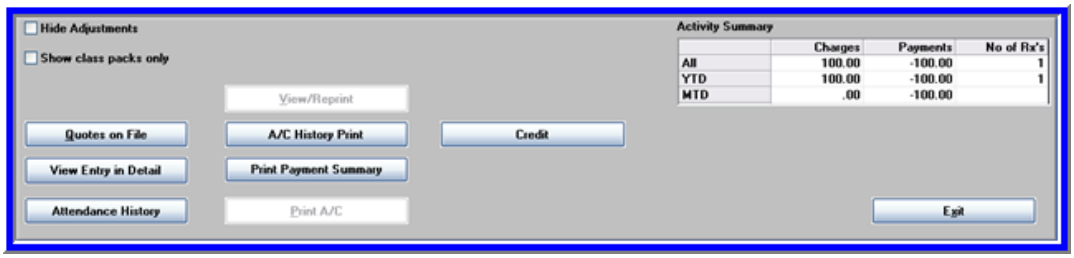
17 Credits / Refunds



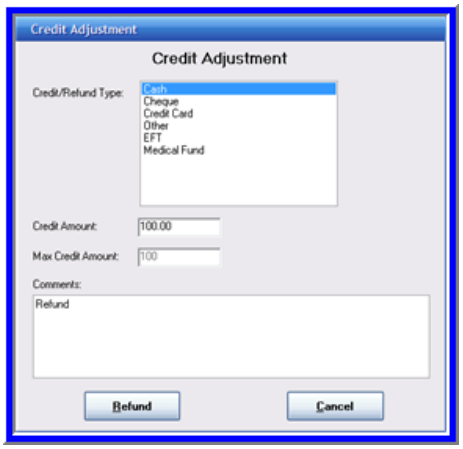
- Open Client Details Screen
- Click A/C Info


Account details for Mickey Mouse
Episode All Episodes
Client No. 39
Unpaid Total : $0.00
Deposit Held : $0.00
Net A/C Bal : $0.00
GST Bal : $0.00
Date Description Ref GST Debit GST Cr Credit Unpaid Balance Printed Episode Practitioner Location TAC Status
01/03/2013 500 - Initial Consultation 1 100.00 100.00 1 Homer Rooms
21/05/2013 Cash:$100.00 159 100.00 0.00 1 (Unspecified)
To work on an entry click on it first.

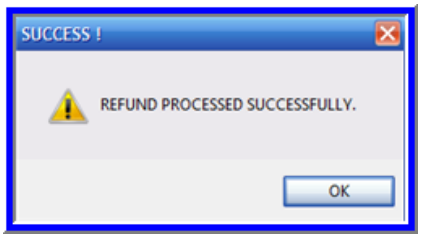
- Click on the Treatment Charge



- Click Credit Button



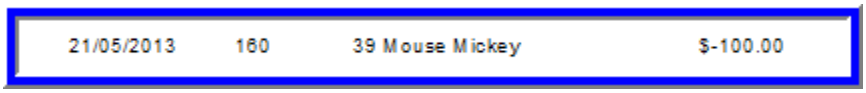
- Select Credit/Refund Type
- Enter amount being refunded
- Enter comment relating to refund (e.g. why it is being refunded)
- Click Refund



- Refund Processed Successfully
- Click OK
- Exit

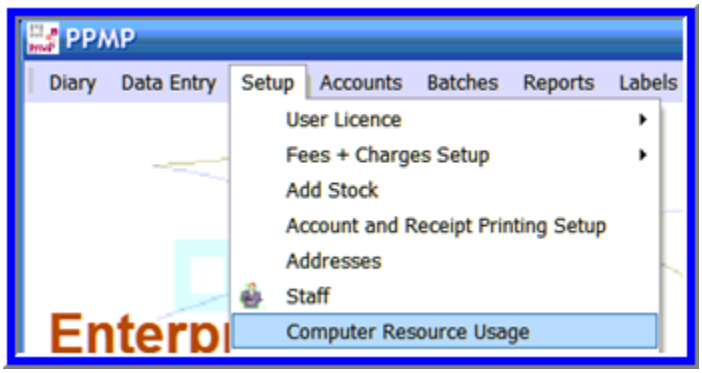
Account details for Mickey Mouse
Episode All Episodes
Client No. 39
Unpaid Total : $0.00
Deposit Held : $0.00
Net A/C Bal : $0.00
GST Bal : $0.00
Date Description Ref GST Debit GST Cr Credit Unpaid Balance Printed Episode Practitioner Location TAC Status
01/03/2013 500 - Initial Consultation 1 100.00 100.00 1 Homer Rooms
21/05/2013 Cash:$100.00 159 100.00 0.00 1 (Unspecified)
21/05/2013 PAYOUT : $100.00, Refu... CRD 100.00 (100.00) 1 Homer
21/05/2013 Credit balanced against P... 100.00 0.00 1 (Unspecified)

- Client A/C Info screen shows Payout etc.
- Check your Banking report and Activity Reports for adjustments.

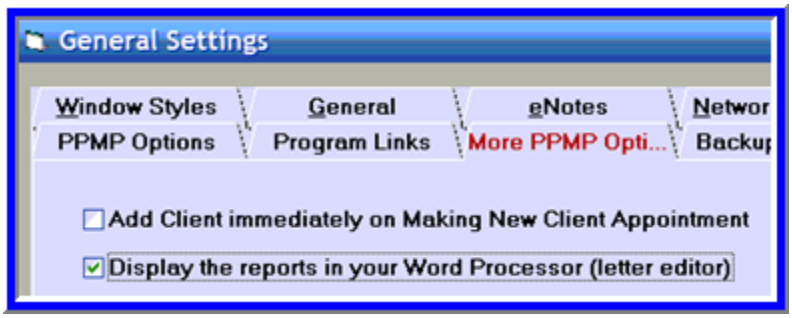


- All reports show negative / refunded amounts

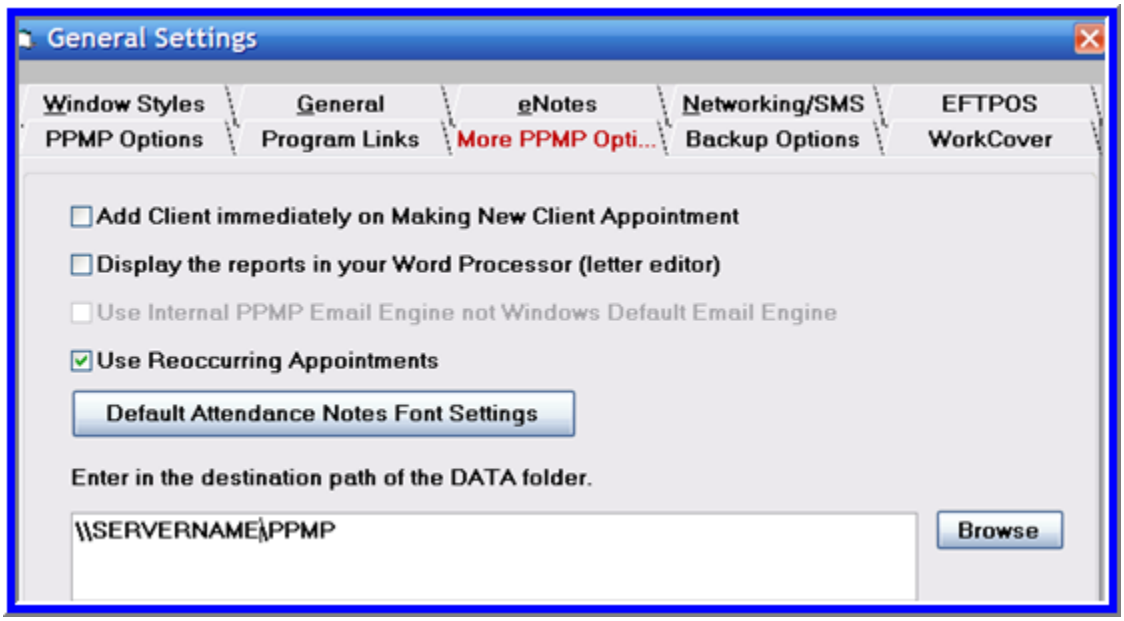
18 Data path



- Go to Setup
- Computer Resource Usage



- More PPMP Options

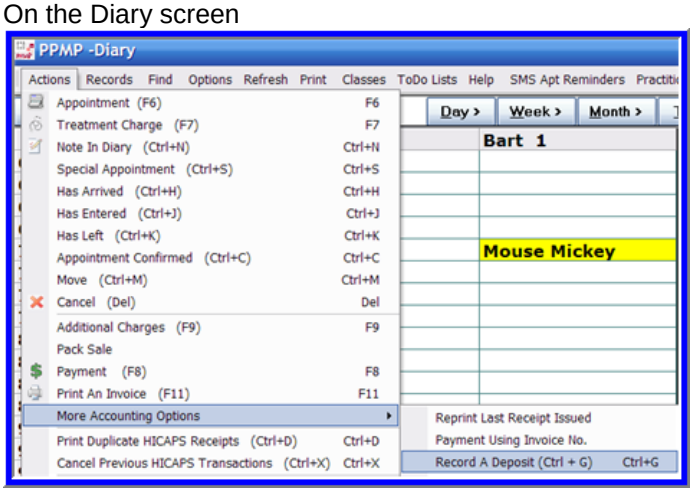


- Make sure the path is \\servername\PPMP) – Close PPMP & Reopen
- Same on all machines EXCEPT Server it stays as C:\Program Files\PPMP

19 Deposits

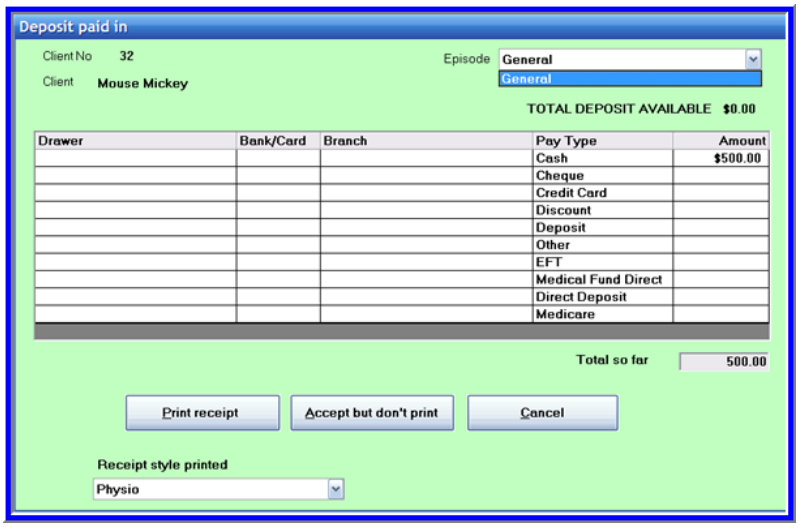
19.1 Recording a deposit

On the Diary screen


PPMP -Diary
Actions Records Find Options Refresh Print Classes ToDo Lists Help SMS Apt Reminders
Appointment (F6) F6
Treatment Charge (F7) F7
Note In Diary (Ctrl+N) Ctrl+N
Special Appointment (Ctrl+S) Ctrl+S
Has Arrived (Ctrl+H) Ctrl+H
Has Entered (Ctrl+J) Ctrl+J
Has Left (Ctrl+K) Ctrl+K
Appointment Confirmed (Ctrl+C) Ctrl+C
Move (Ctrl+M) Ctrl+M
Cancel (Del) Del
Additional Charges (F9) F9
Pack Sale
Payment (F8) F8
Print An Invoice (F11) F11
More Accounting Options
Print Duplicate HICAPS Receipts (Ctrl+D) Ctrl+D
Cancel Previous HICAPS Transactions (Ctrl+X) Ctrl+X
Day > Week > Month >
Bart 1
Mouse Mickey
Reprint Last Receipt Issued
Payment Using Invoice No.
Record A Deposit (Ctrl + G) Ctrl+G

- Click Actions
- More Accounting Options
- Record a Deposit

NB: If you have selected a client on the diary then this is where the deposit will be recorded – otherwise choose a client from the list.

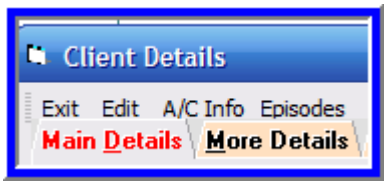


- Enter the amount being paid and how it was paid (cash, cheque, etc.)
- Select the Episode

- Select a Receipt Style
- Choose to Print or Accept but don't print

Open up the client's details screen

- Bottom right you will see “Deposit Held”
- Click on Details to view Episodes deposit is related to
- Check the Account Info screen is displaying the correct information



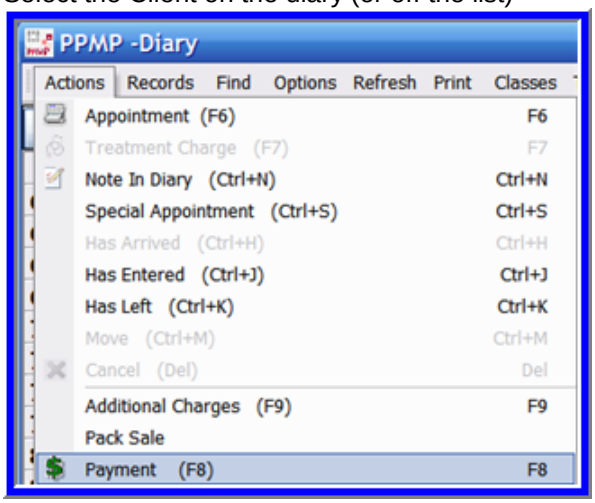
- Click Episodes

- Click A/C Info

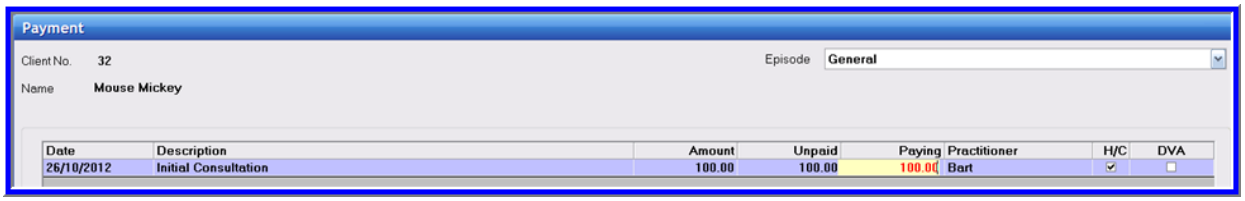
- Make sure Balance is in brackets.
- Charge the client in the usual way

19.2 Payment using deposit

Select the Client on the diary (or off the list)

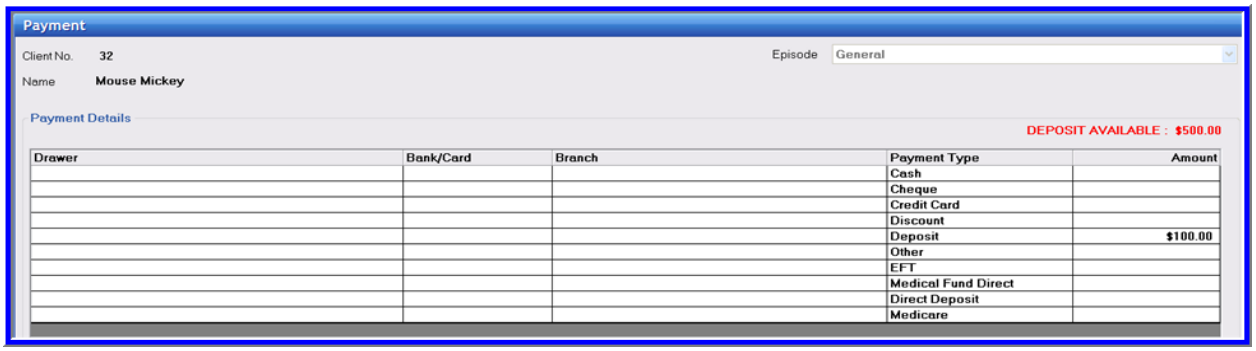


- Click on Actions
- Click on Payment



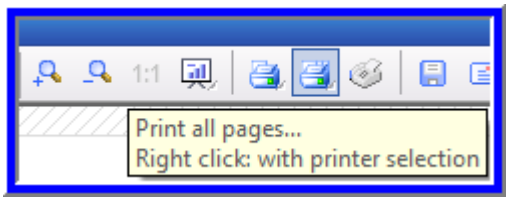
- Enter amount being paid

- Click Paying All (or Paying Some)

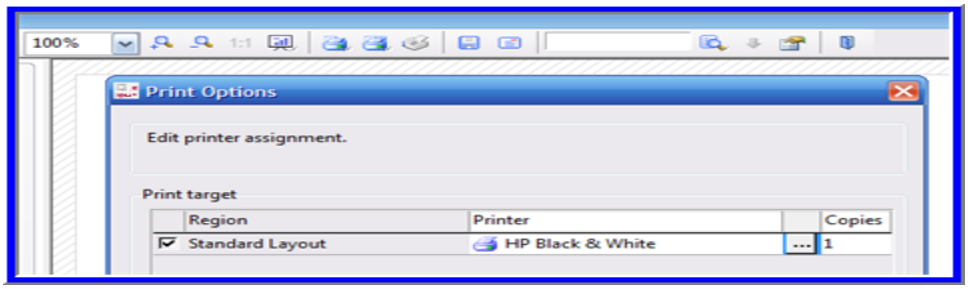


- Click in Amount Column and select **DEPOSIT**
- Enter in the Amount

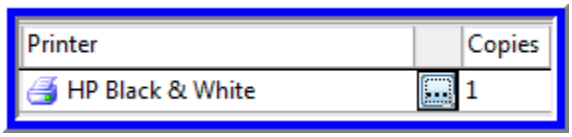
- Choose to Print a receipt or Accept but don't print
- OR Tick Preview Report to display the receipt (if you wish to print to an alternate printer)



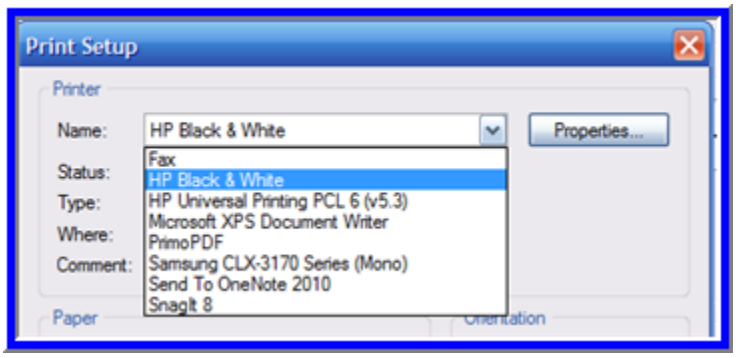
- Right Click on the 2nd Printer Icon



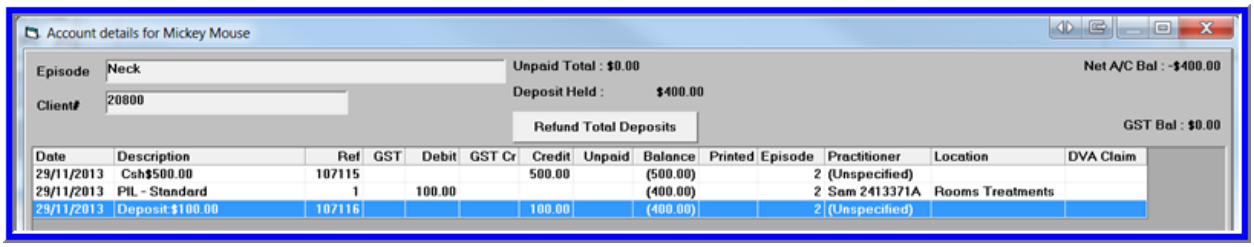
- Print Options Screen will enable you to change the Printer you wish to print to



- Click on the …Button



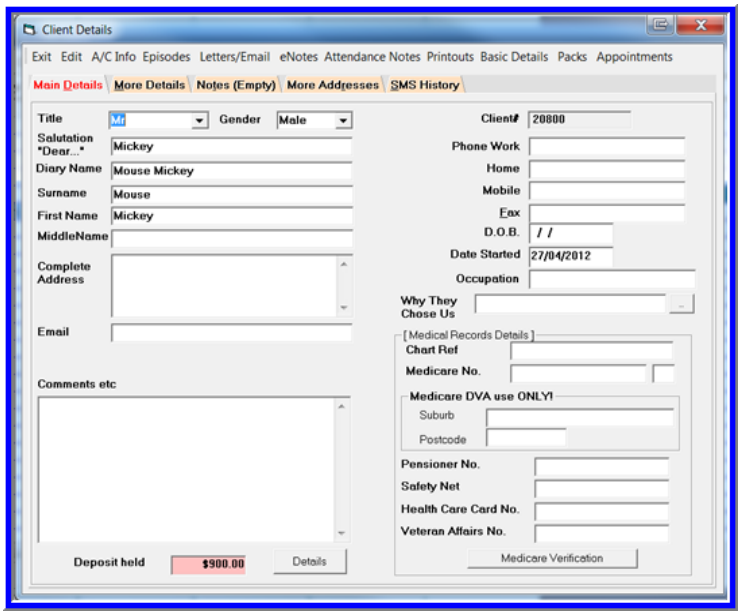
- Select your printer


Account details for Mickey Mouse
Episode
Neck
Client#
20800
Unpaid Total : $0.00
Deposit Held : $400.00
Refund Total Deposits
Net A/C Bal : -$400.00
GST Bal : $0.00
Date Description Ref GST Debit GST Cr Credit Unpaid Balance Printed Episode Practitioner Location DVA Claim
29/11/2013 Csh$500.00 107115 500.00 (500.00) 2 (Unspecified)
29/11/2013 PIL - Standard 1 100.00 (400.00) 2 Sam 2413371A Rooms Treatments
29/11/2013 Deposit $100.00 107116 100.00 (400.00) 2 (Unspecified)

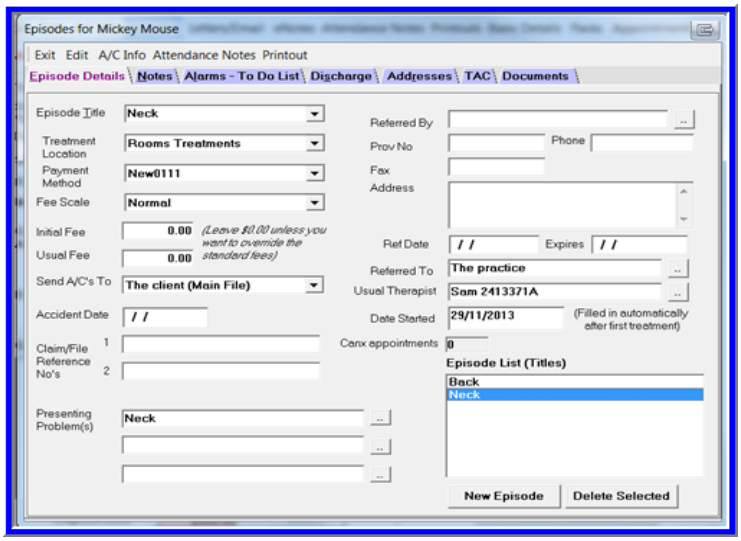
- Go back and display the account info screen (deposit held has decreased as has Account Balance)
- Also note the Refund Total Deposit button (if the account is not in balance this will not be available

19.3 Refund total deposits

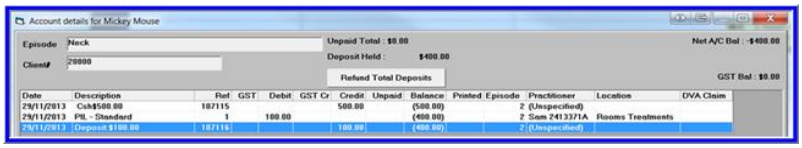
In the Client File



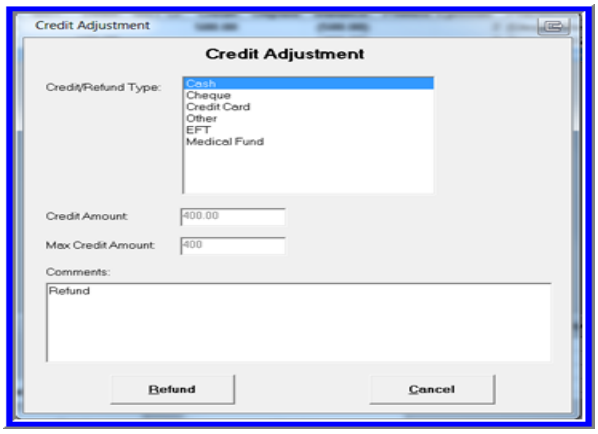
- Click Episodes tab



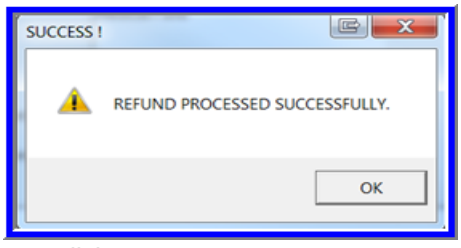
- Select Episode
- Click A/C Info


Account details for Mickey Mouse
Episode Neck
Client# 20000
Unpaid Total : $0.00
Deposit Held : $400.00
Refund Total Deposits
Net A/C Bal : -$400.00
GST Bal : $0.00
Date Description Ref GST Debit GST Cr Credit Unpaid Balance Printed Episode Practitioner Location DVA Claim
29/11/2013 Cash$500.00 107115 500.00 (500.00) 2 (Unspecified)
29/11/2013 PIL - Standard 1 100.00 (400.00) 2 Sam 2413371A Rooms Treatments
29/11/2013 Deposit$100.00 107116 100.00 (400.00) 2 (Unspecified)

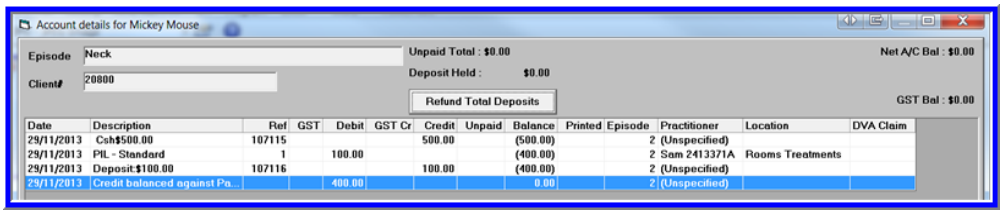
- Click Refund Total Deposits



- Select Credit/Refund Type
- Check Amount Refunding
- Type in a comment
- Click Refund



- Click OK

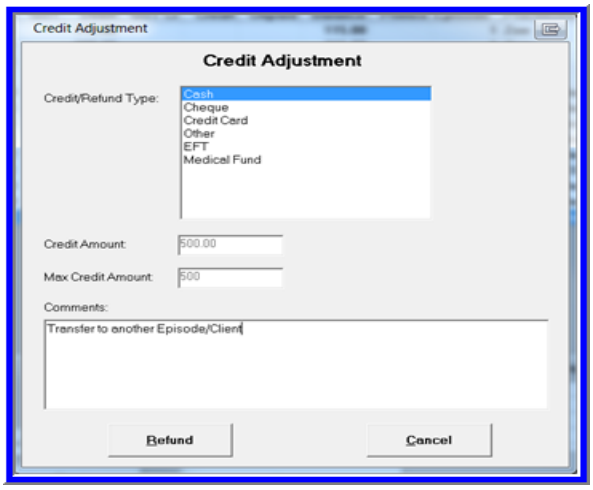

Account details for Mickey Mouse
Episode Neck
Client# 20800
Unpaid Total : $0.00
Deposit Held : $0.00
Refund Total Deposits
Net A/C Bal : $0.00
GST Bal : $0.00
Date Description Ref GST Debit GST Cr Credit Unpaid Balance Printed Episode Practitioner Location DVA Claim
29/11/2013 Csh$500.00 107115 500.00 (500.00) 2 (Unspecified)
29/11/2013 PIL - Standard 1 100.00 (400.00) 2 Sam 2413371A Rooms Treatments
29/11/2013 Deposit $100.00 107116 100.00 (400.00) 2 (Unspecified)
29/11/2013 Credit balanced against Pa... 400.00 0.00 2 (Unspecified)

- Go back to Account info screen and check information recorded correctly

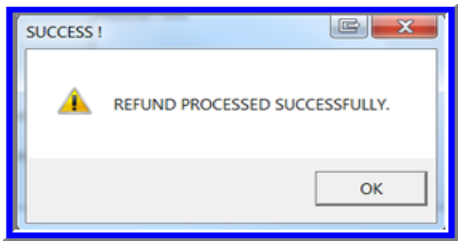
19.4 Transferring deposit to another episode

Account details for Mickey Mouse
Episode Neck
Client# 20800
Unpaid Total : $0.00
Deposit Held : $400.00
Refund Total Deposits
Net A/C Bal : -$400.00
GST Bal : $0.00
Date Description Ref GST Debit GST Cr Credit Unpaid Balance Printed Episode Practitioner Location DVA Claim
29/11/2013 Csh$500.00 107115 500.00 (500.00) 2 (Unspecified)
29/11/2013 PIL - Standard 1 100.00 (400.00) 2 Sam 2413371A Rooms Treatments
29/11/2013 Deposit $100.00 107116 100.00 (400.00) 2 (Unspecified)

- Click Refund Total Deposits



- This must be Refunded as Cash
- In Comments record you are transferring to another Episode or Client
- Click Refund

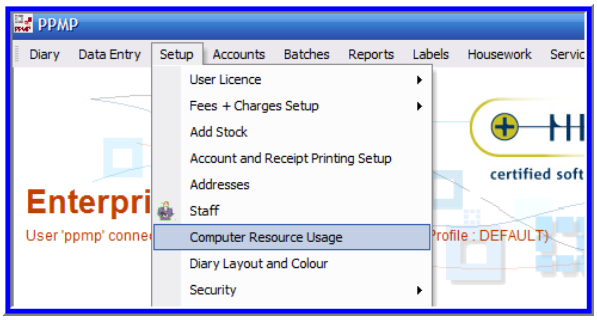


- Click OK
- You must then follow the Record a Deposit procedure to enter the amount into another Episode or on another client's files
- Your Banking report will then show a negative amount and a positive amount (cancelling each other out)

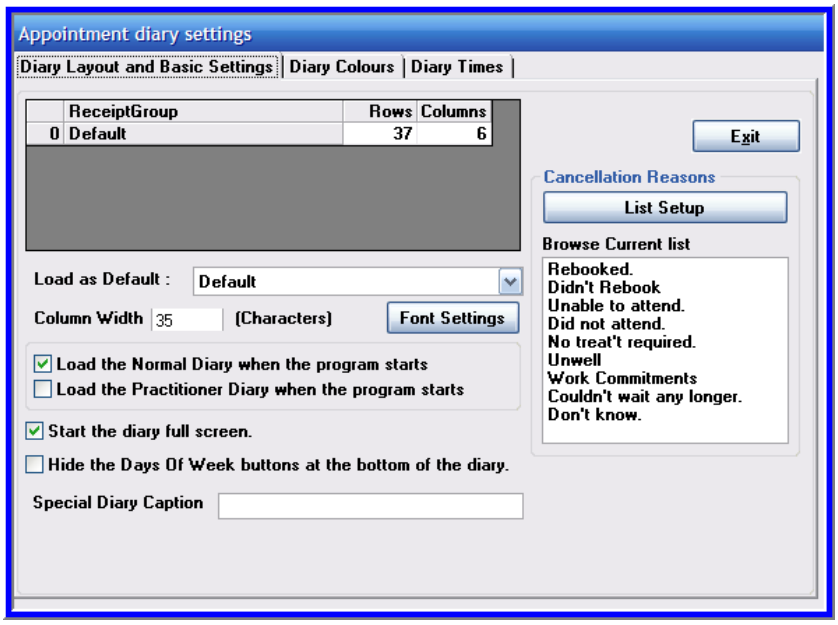
20 Diary layout & colour

Click HERE to watch video

From the main PPMP® menu

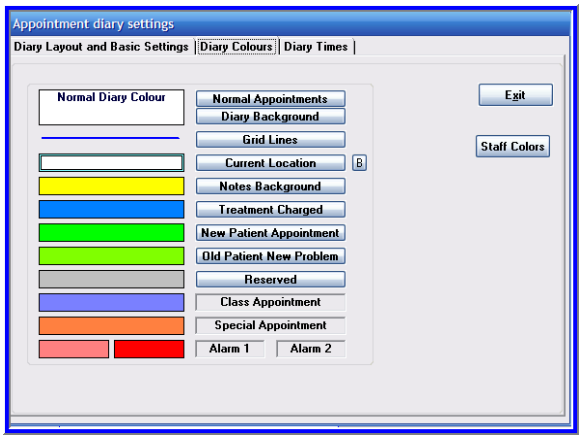


- Setup
- Diary layout and colour



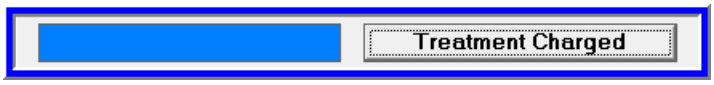
- This is where you set up your diary rows
- Columns
- Fonts

- Click on Diary Colours Tab



- Colours displayed are the colours currently selected
- To change a colour click on the corresponding button, e.g.: click on Treatment Charge
- A colour chart will appear

- Select a color (e.g.: blue)
- Click OK



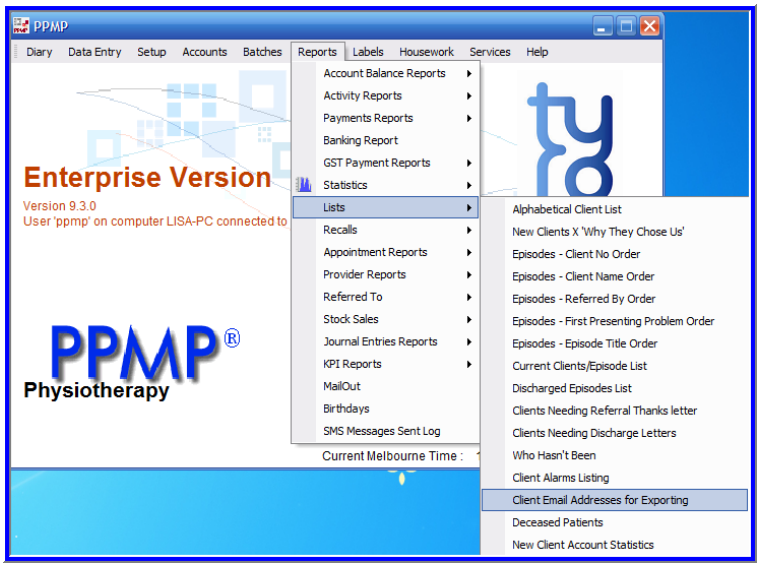
- You have selected BLUE for your Treatment Charged

- Click Refresh Diary & Exit
- Your Appointments, Reserves and Notes all appear with your chosen colour.

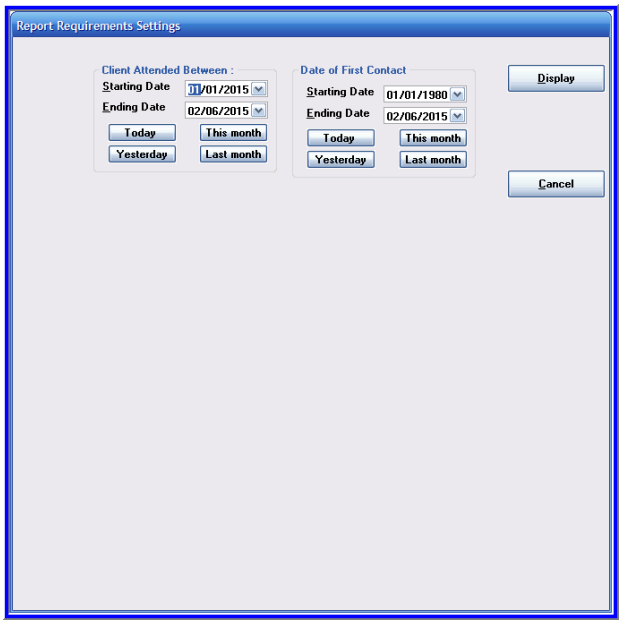
21 Emails

21.1 Exporting client email addresses

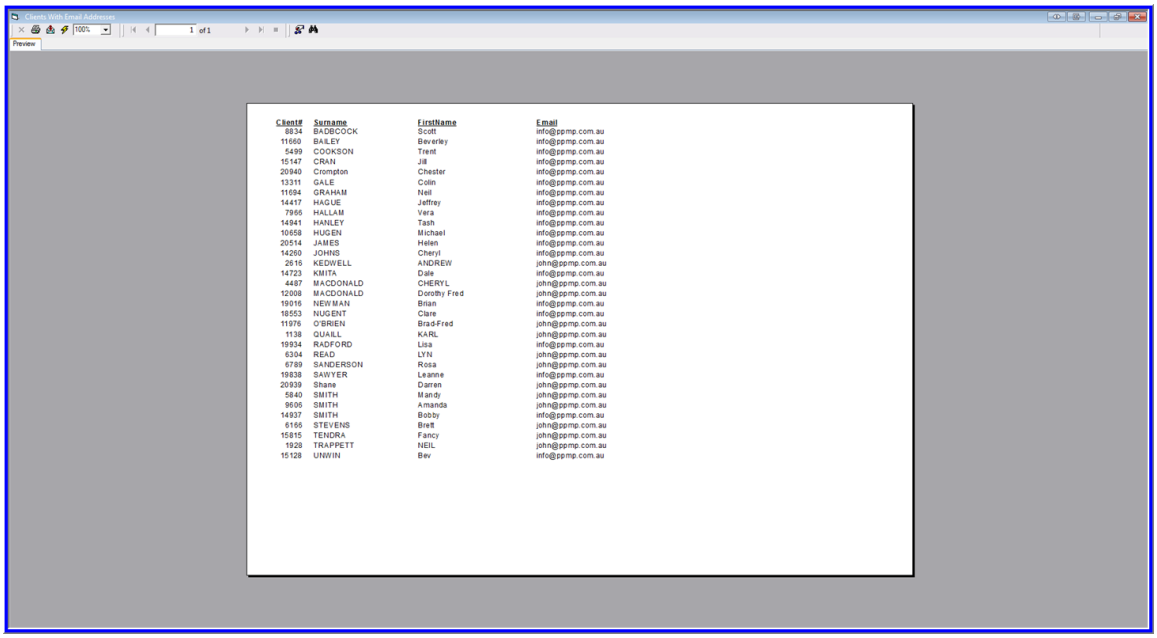
From the Main Menu of PPMP®



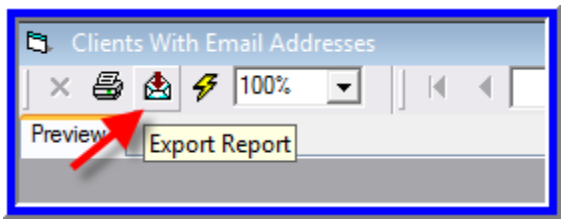
- Select Reports
- Select Lists
- Select Client Email Addresses for Exporting



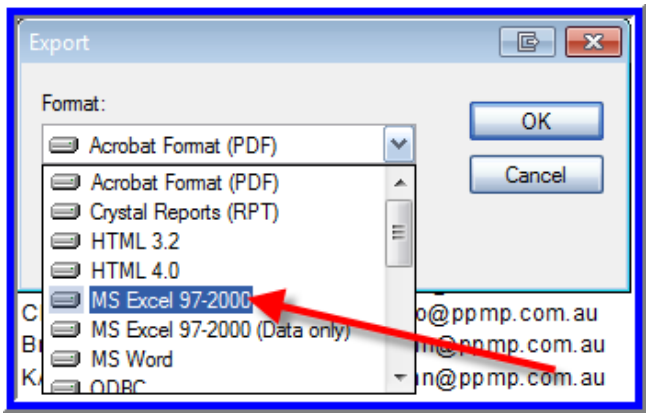
- Select date range (usually Client Attended Between date)
- Click Display


Clients With Email Addresses
Client# Surname FirstName Email
8834 BADBCOCK Scott info@ppmp.com.au
11660 BAILEY Beverley info@ppmp.com.au
5499 COOKSON Trent info@ppmp.com.au
15147 CRAN Jill info@ppmp.com.au
20940 Crompton Chester info@ppmp.com.au
13311 GALE Colin info@ppmp.com.au
11694 GRAHAM Neil info@ppmp.com.au
14417 HAGUE Jeffrey info@ppmp.com.au
7966 HALLAM Vera info@ppmp.com.au
14941 HANLEY Tash info@ppmp.com.au
10658 HUGEN Michael info@ppmp.com.au
20514 JAMES Helen info@ppmp.com.au
14260 JOHNS Cheryl info@ppmp.com.au
2616 KEDWELL ANDREW john@ppmp.com.au
14723 KMITA Dale info@ppmp.com.au
4487 MACDONALD CHERYL john@ppmp.com.au
12008 MACDONALD Dorothy Fred john@ppmp.com.au
19016 NEWMAN Brian info@ppmp.com.au
18553 NUGENT Clare info@ppmp.com.au
11976 O'BRIEN Brad-Fred john@ppmp.com.au
1138 QUAILL KARL john@ppmp.com.au
19934 RADFORD Lisa info@ppmp.com.au
6304 READ LYN john@ppmp.com.au
6789 SANDERSON Rosa john@ppmp.com.au
19838 SAWYER Leanne info@ppmp.com.au
20939 Shane Darren john@ppmp.com.au
5840 SMITH Mandy john@ppmp.com.au
9606 SMITH Amanda john@ppmp.com.au
14937 SMITH Bobby info@ppmp.com.au
6166 STEVENS Brett john@ppmp.com.au
15815 TENDRA Fancy john@ppmp.com.au
1928 TRAPPETT NEIL john@ppmp.com.au
15128 UNWIN Bev info@ppmp.com.au

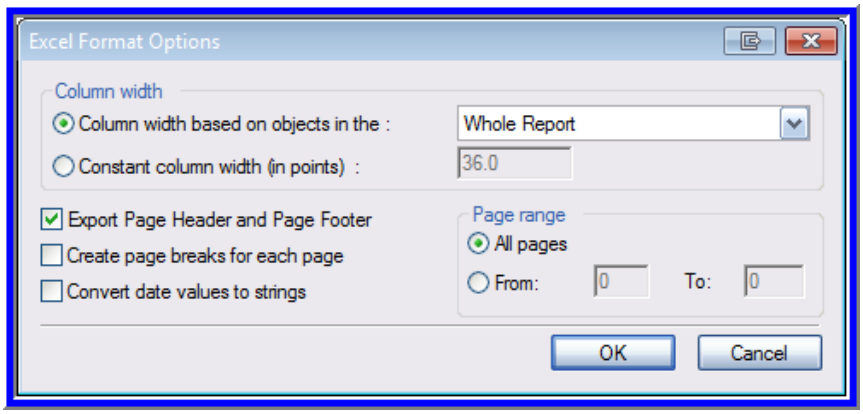
- The following screen appears



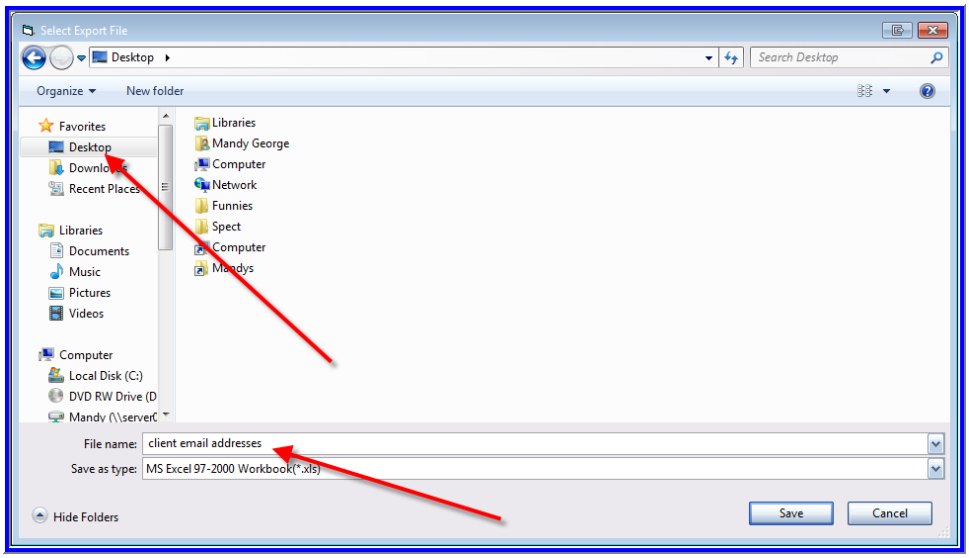
- Click the export icon



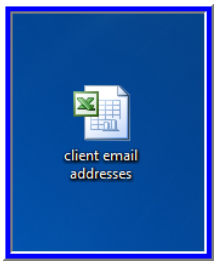
- Select MS Excel 97-2000 from the drop down list
- Click OK



- The following screen appears
- Click OK



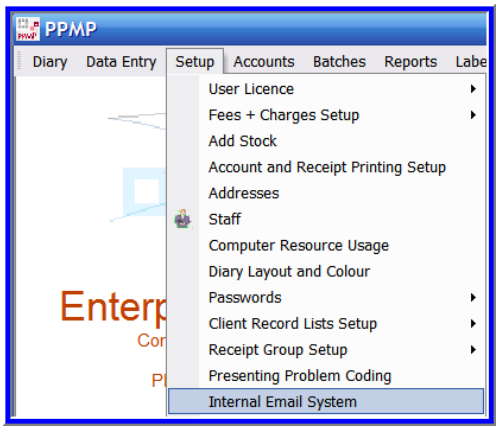
- Select Where you want to save the file
- Name the file to what you want
- Click Save



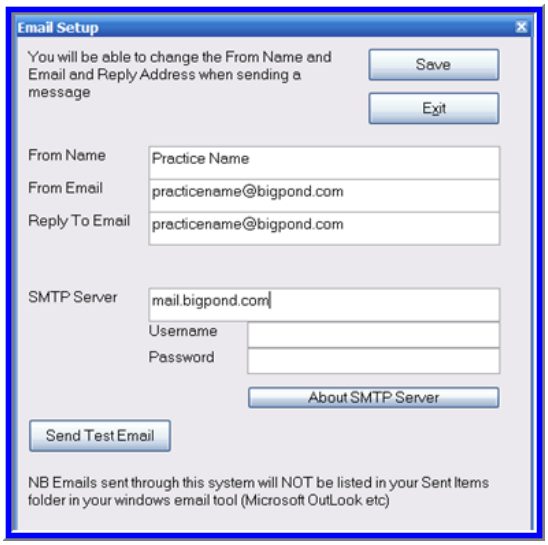
- You should now be able to find your file where you saved it to merge into your email client

21.2 Email setup

On the Main Menu PPMP



- Click Setup
- Click Internal Email System



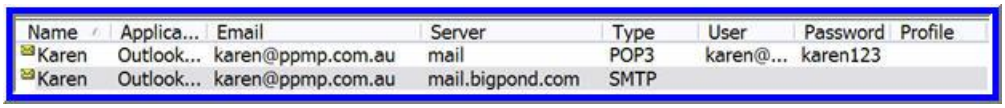
- All fields must be filled in on the above screen

If you are unsure of any of this information, you can download a program to tell you this.
The program is called Mail Pass View; it is a free utility that checks your email information.

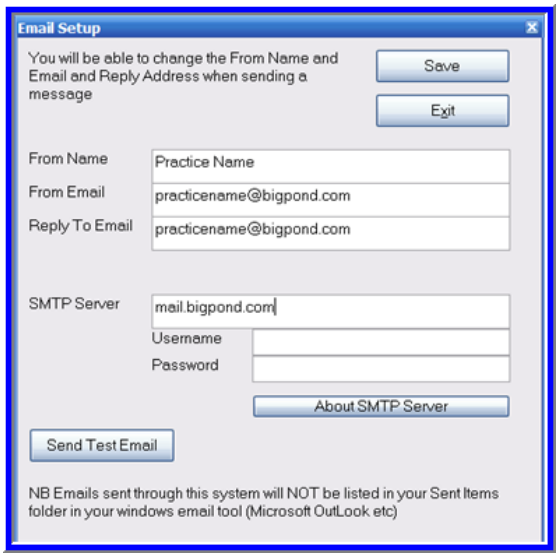
It can be downloaded from here, http://www.snapfiles.com/get/mailpass.html

Freeware > Security-Privacy > Password Recovery Tools
Mail PassView
View Email Account Information
Our Rating: (Very Good)
Mail PassView allows you to view account information, including username and password for POP accounts in Outlook Express, Microsoft Outlook 2000/2003, IncrediMail, Eudora and Group Mail Free. Just run the program and the window will automatically find and display all accounts. You can choose to save all or selected accounts to a text file or copy it to the clipboard.
Freeware
Download

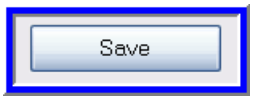
- After you have downloaded & run the program it will come up with a list of your email details.



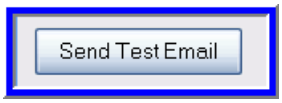
- Your email Address, SMTP Server & Password are displayed.



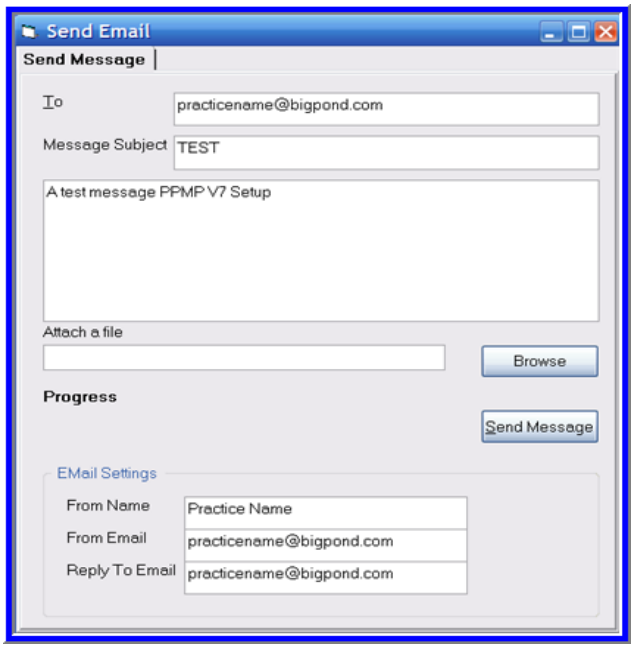
- Enter these into the required fields.



- Click Save



- Click Send Test Email



- Put a Message Subject Title (TEST)
- A brief description will automatically be inserted into the message box

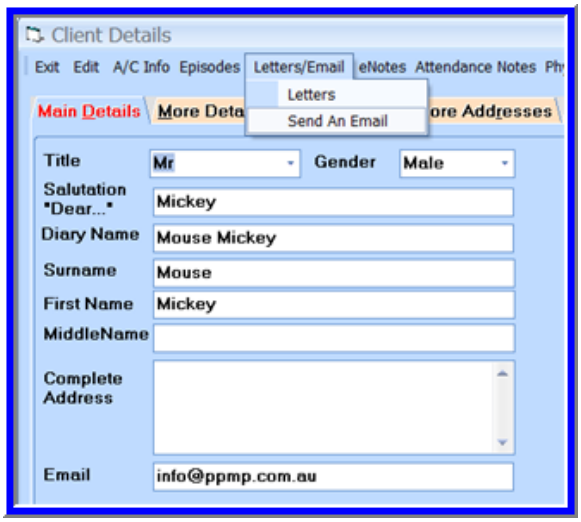
- Click Send Message

- Check your email – the test email should be in your inbox.

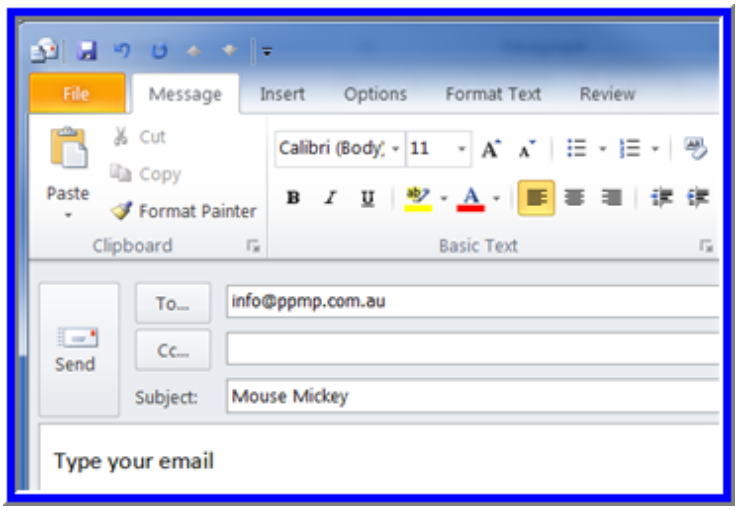
21.3 Sending emails (You can send individual emails or bulk emails)

Send Individual Emails

In the Client Details Screen



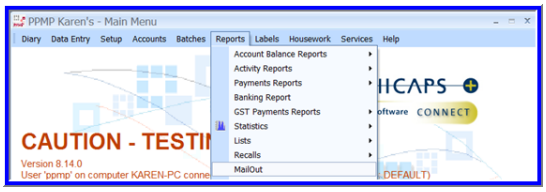
- Click on Letters/Email
- Click Send Email



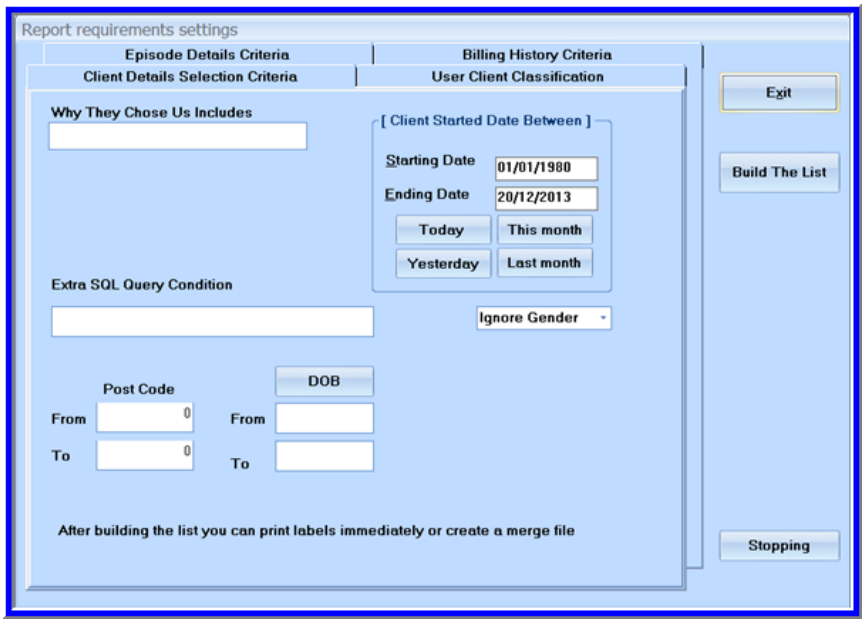
- Type your message and then
- Click send

21.4 Bulk email

On the main screen PPMP

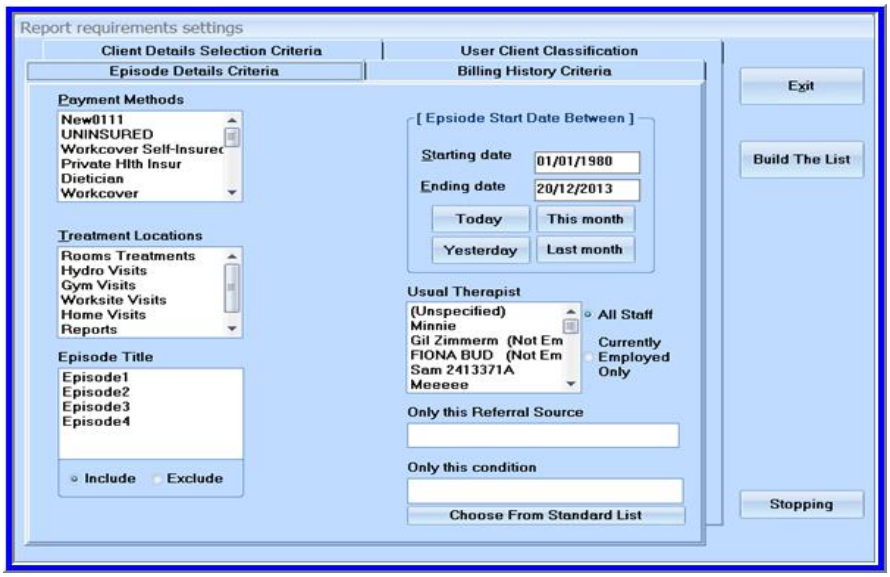


- Click Reports
- Mailout



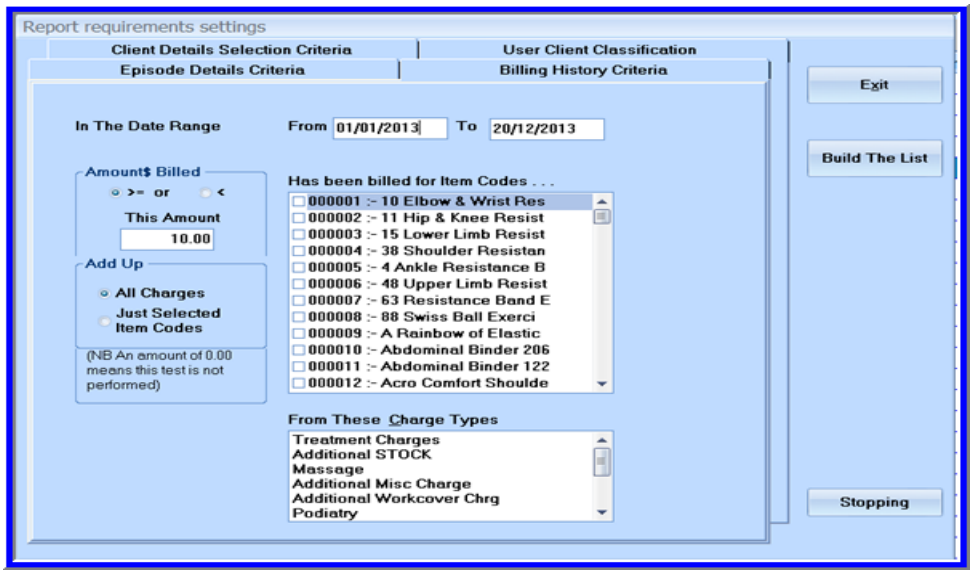
- Select the Start Date Range

OR



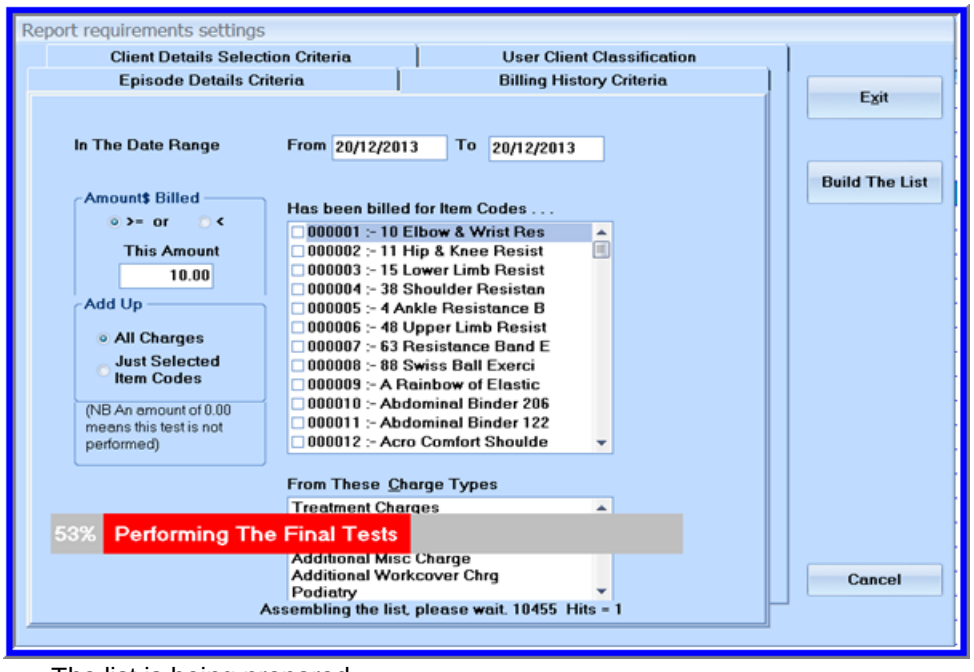
- Click Episode Selection Settings
- Select the Episode Start Dates
- Select the Payment Method, Location, Staff (or select nothing to get all fields)

OR

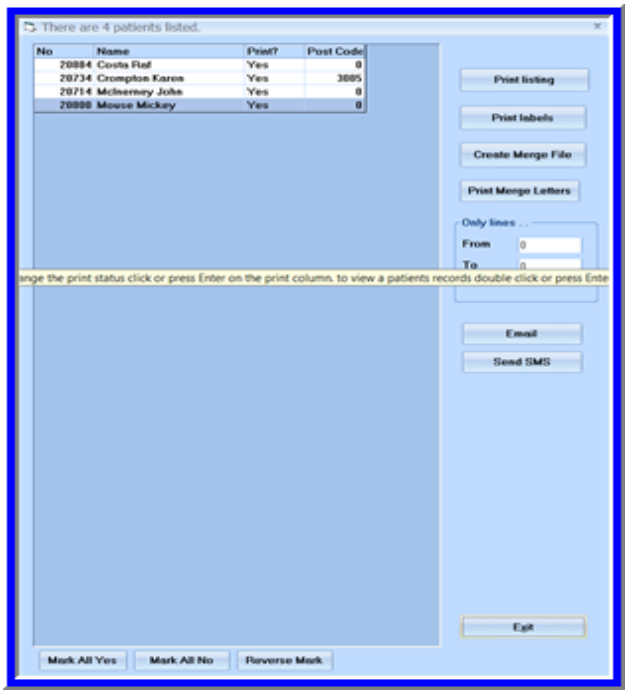


- Select Amount Billed (by specifying an amount your report will display all clients that have been billed that amount between the specified dates)

- Click Build the List


Report requirements settings
Client Details Selection Criteria
User Client Classification
Episode Details Criteria
Billing History Criteria
Exit
In The Date Range
From 20/12/2013
To 20/12/2013
Build The List
Amount$ Billed
>= or <
This Amount
10.00
Add Up
All Charges
Just Selected Item Codes
(NB An amount of 0.00 means this test is not performed)
Has been billed for Item Codes . . .
000001 :- 10 Elbow & Wrist Res
000002 :- 11 Hip & Knee Resist
000003 :- 15 Lower Limb Resist
000004 :- 38 Shoulder Resistan
000005 :- 4 Ankle Resistance B
000006 :- 48 Upper Limb Resist
000007 :- 63 Resistance Band E
000008 :- 88 Swiss Ball Exerci
000009 :- A Rainbow of Elastic
000010 :- Abdominal Binder 206
000011 :- Abdominal Binder 122
000012 :- Acro Comfort Shoulde
From These Charge Types
Treatment Charges
53%
Performing The Final Tests
Additional Misc Charge
Additional Workcover Chrg
Podiatry
Cancel
Assembling the list, please wait. 10455 Hits = 1

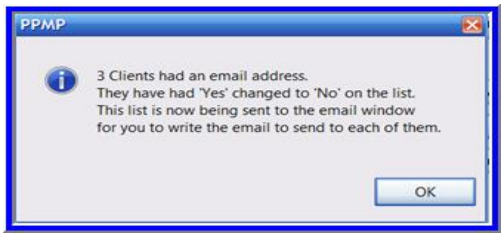
- The list is being prepared



- Your list of clients will be displayed

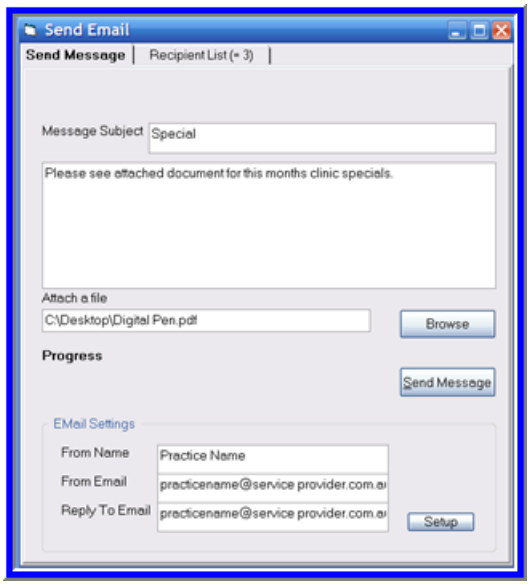
NB: Top of the screen tells you how many patients are on the list

- Click Email

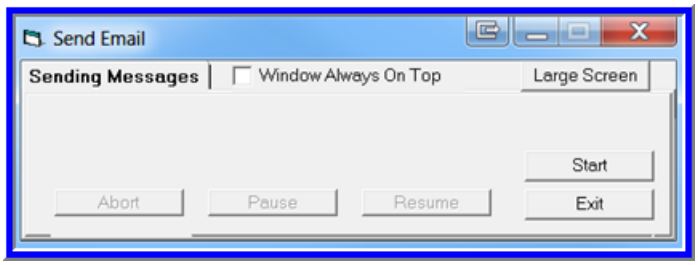

PPMP
3 Clients had an email address.
They have had 'Yes' changed to 'No' on the list.
This list is now being sent to the email window
for you to write the email to send to each of them.
OK

- This tells you how many clients have an email address
- Click OK

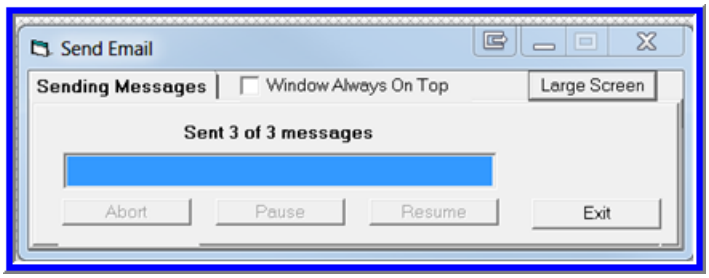
- Click Recipients to see a list of all clients with email address (delete option available)
- Click back on Send Message



- Fill in the Message Subject and a short description
- Attach file (if required)
- Click Send message



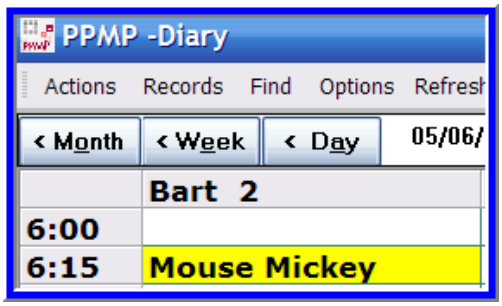
- Click Start



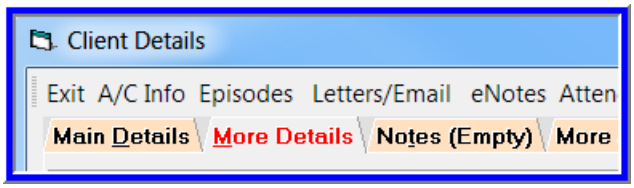
- Once all messages have been sent
- Click Exit

22 Flag 1 & 2 setup

Go to Client Details

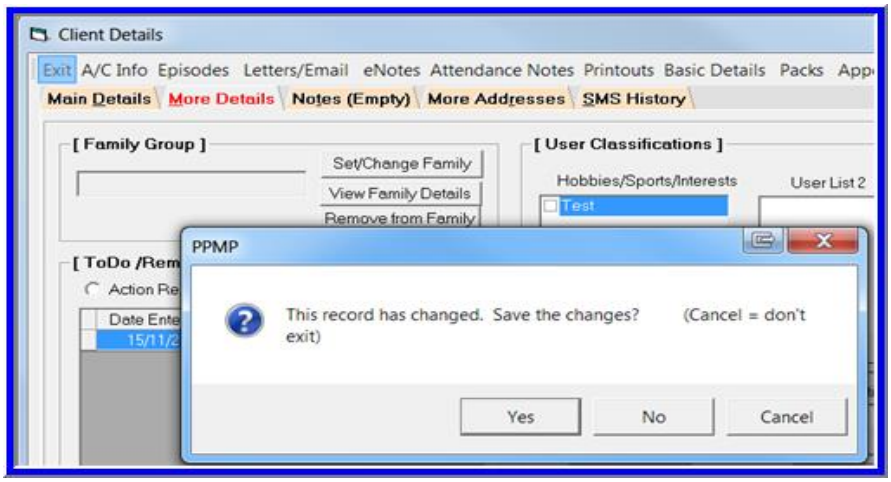


- Double click on clients name on the diary (or search for client)



- More details

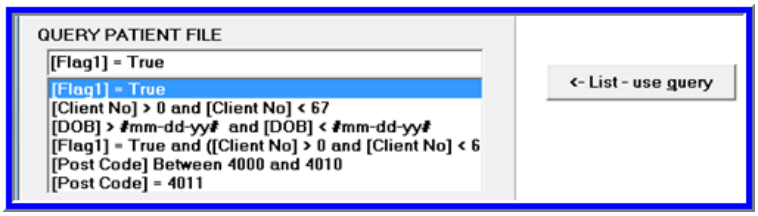
- Tick News Letter (Flag 1)



- Click Exit & Yes to Save the Changes

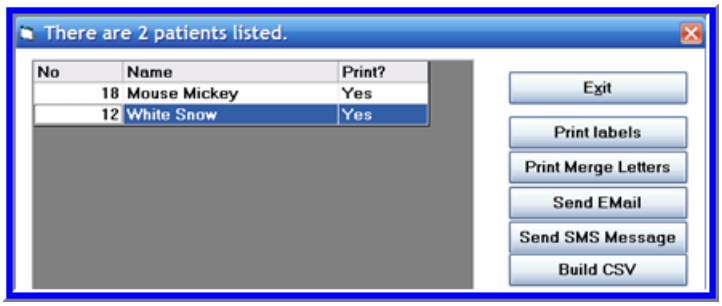
On the Main Screen of PPMP

- Print Labels



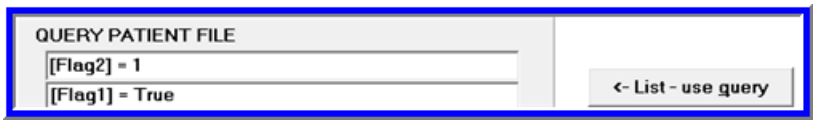
- Select (Flag 1) = True

- Click “List - use query”

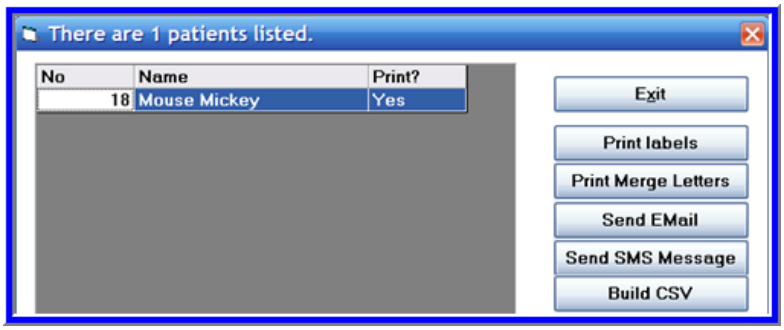


- List displays

- You can then print labels, email or sms



- If using Flag 2 – change (Flag1) to (Flag2) = 1 (for true – meaning you want a list of clients who have flag 2 ticked.



- Clients listed have Flag 2 ticked – a client can have both Flag 1 & 2 ticked

NB: If you are after a list of clients that **do not** have Flag 2 ticked – change (Flag1) to (Flag2)= 0

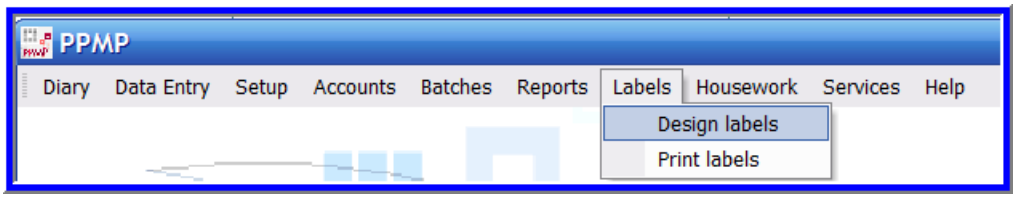
OR: If you are after a list of clients that **do not** have Flag 1- ticked – change (Flag1)= 0

23 List and labels

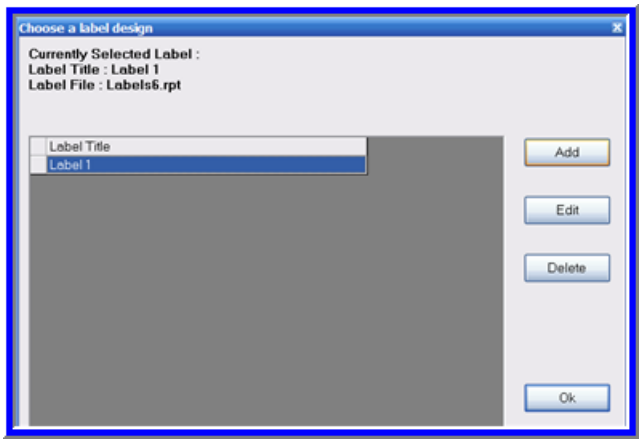
You can print lists/labels for doctors, clients or whoever you have in your addresses lists:

23.1 Lables setup

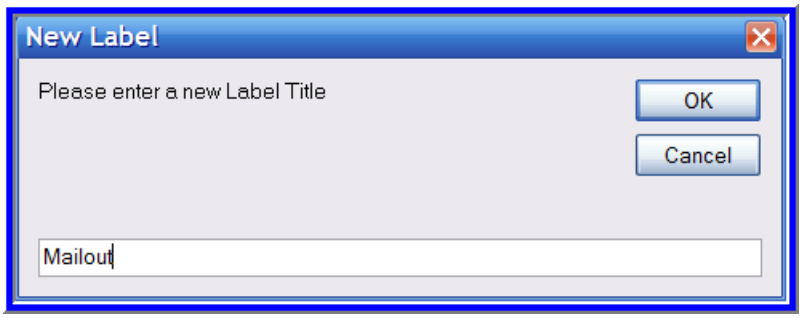
On the PPMP main menu



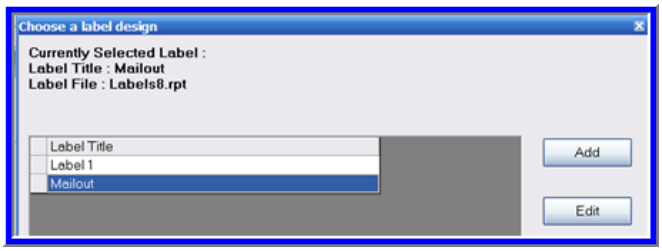
- Go to Labels
- Design Labels



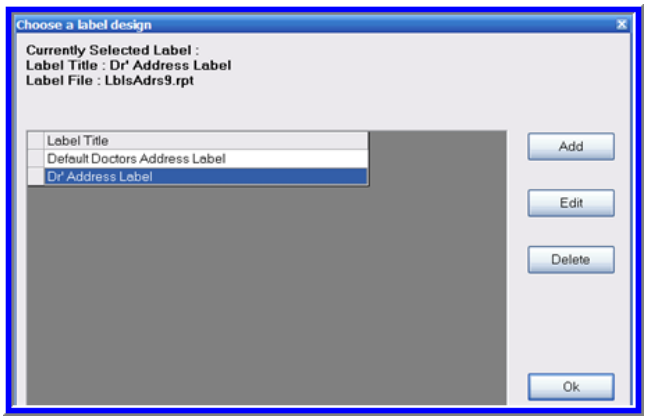
- Click Add



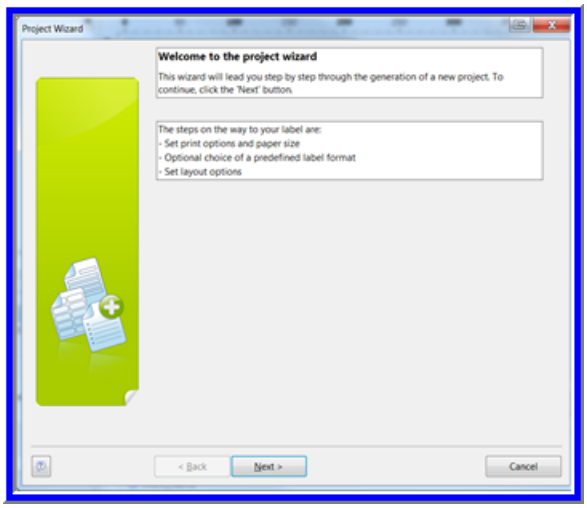
- Give the New Label a Name
- Click OK



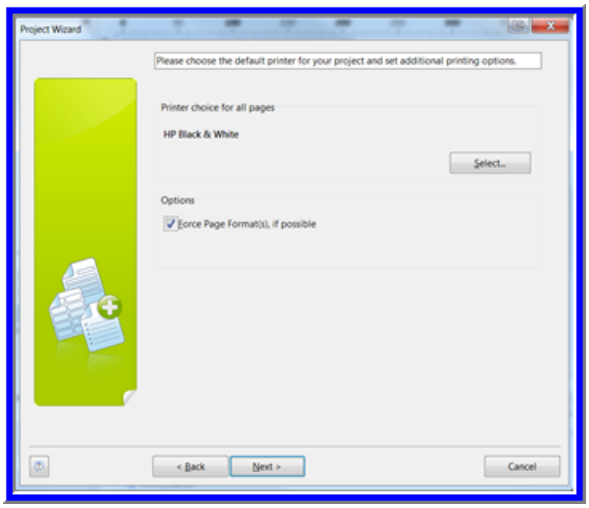
- Select the New Label
- Click Edit



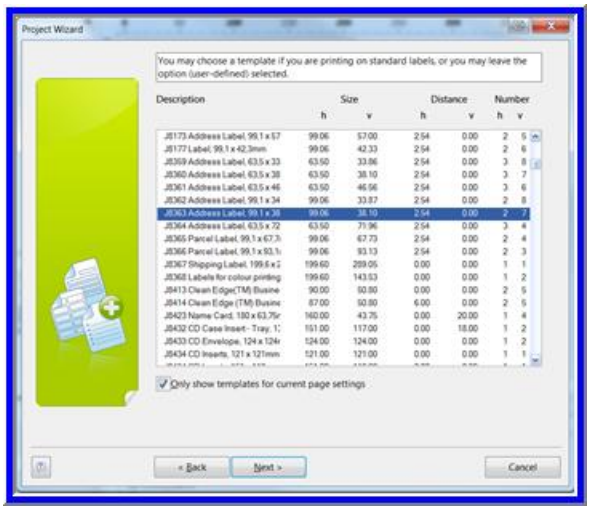
- Select Label
- Click OK


Project Wizard
Welcome to the project wizard
This wizard will lead you step by step through the generation of a new project. To continue, click the 'Next' button.
The steps on the way to your label are:
- Set print options and paper size
- Optional choice of a predefined label format
- Set layout options
< Back
Next >
Cancel

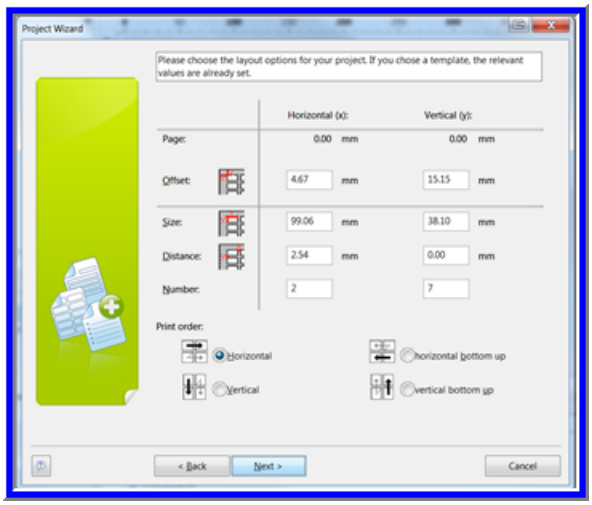
- Wizard will guide you through the Label setup
- Click Next


Project Wizard
Please choose the default printer for your project and set additional printing options.
Printer choice for all pages
HP Black & White
Select...
Options
Force Page Format(s), if possible
< Back
Next >
Cancel

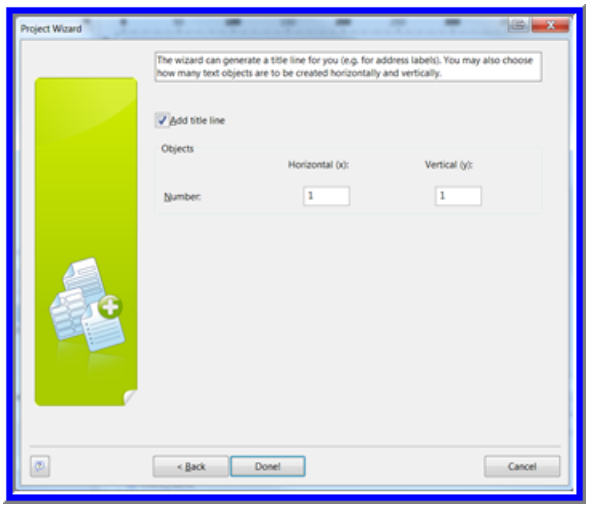
- Select Printer
- Click Next


Project Wizard
You may choose a template if you are printing on standard labels, or you may leave the option (user-defined) selected.
Description
Size
Distance
Number
Only show templates for current page settings
< Back
Next >
Cancel

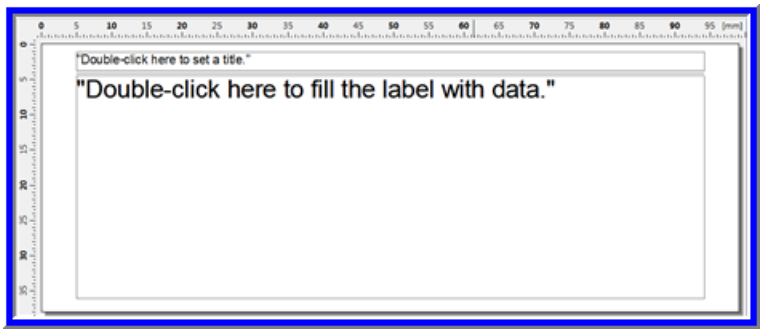
- Scroll the List and select your label Name or Size
- Click Next



- Measurements have been automatically filled in as per your label selection
- Click Next

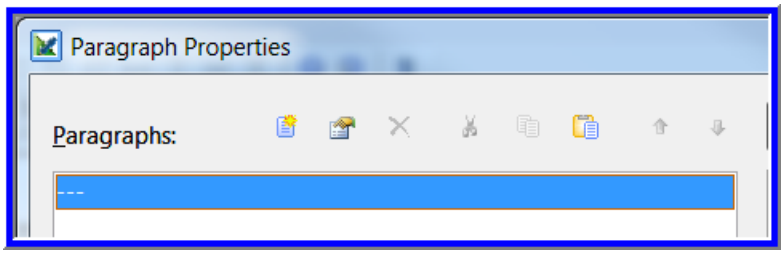

Project Wizard
The wizard can generate a title line for you (e.g. for address labels). You may also choose how many text objects are to be created horizontally and vertically.
Add title line
Objects
Horizontal (x):
Vertical (y):
Number:
< Back
Done!
Cancel

- Click Done

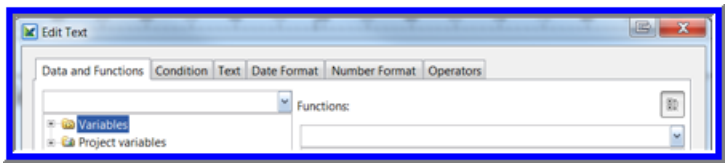


- You are now looking at one of your labels
- You can add a Title or Delete the Title Box – click in it and select Delete on your Keyboard
- Double Click in the large box to add your Data

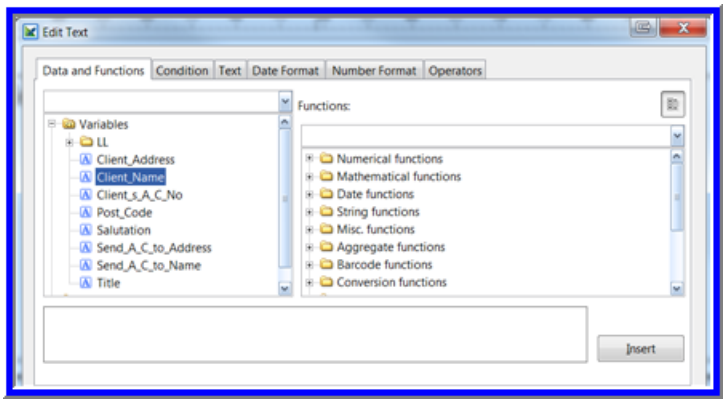
- Highlight existing line and click X to delete



- Double Click on ---

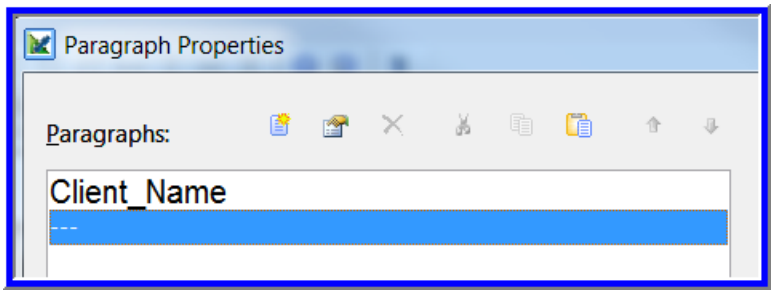


- Click on + next to Variables

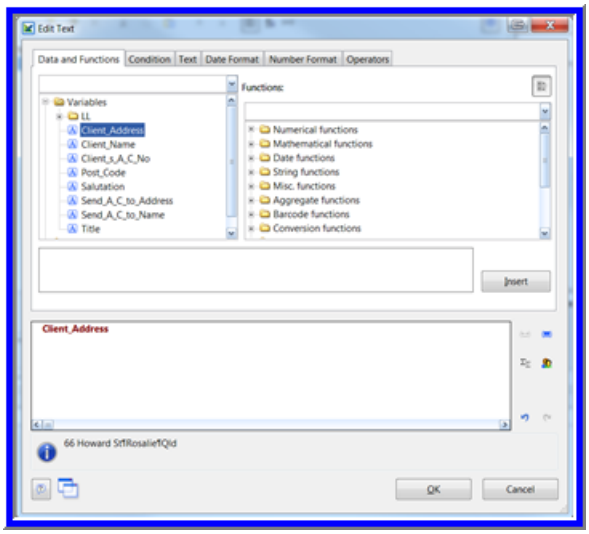


- Select Details (one at a time)
- Click Insert

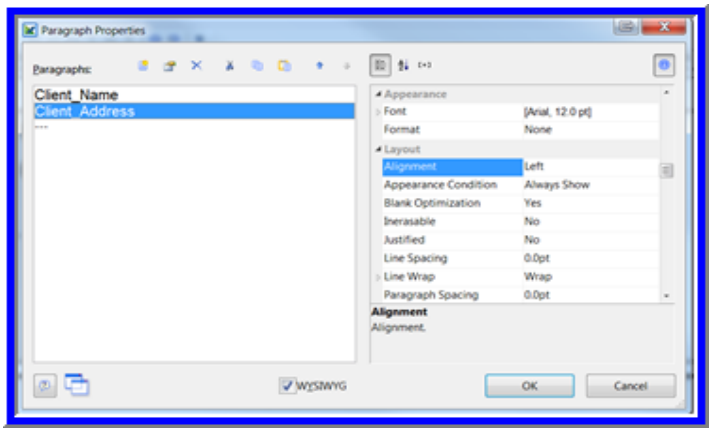
- Click OK



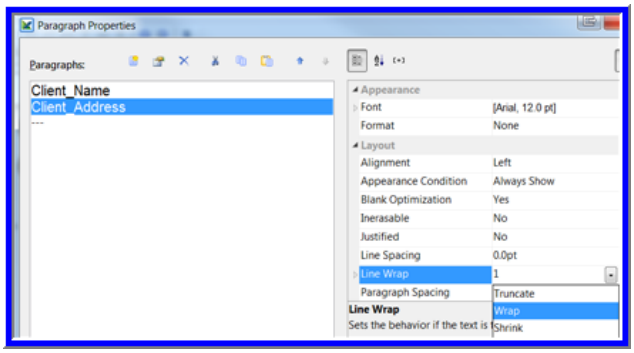
- Your selected Variable is now listed



- Double click on --- and select the next Variable you want to add
- Click Insert
- Click OK

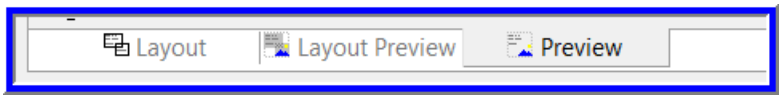


- Highlight “Client Address”



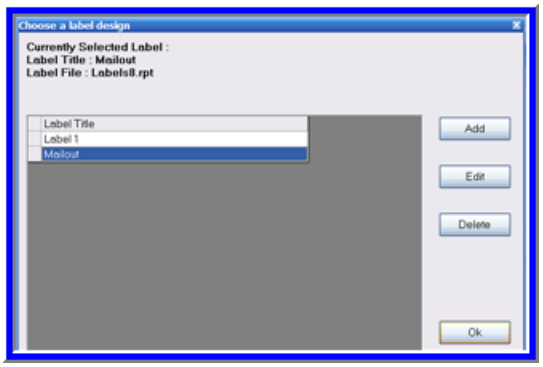
- On the Right Hand Side you can select different settings
- We recommend that you select “Wrap” for the Line Wrapping
- Click OK

- You Label now displays the above information



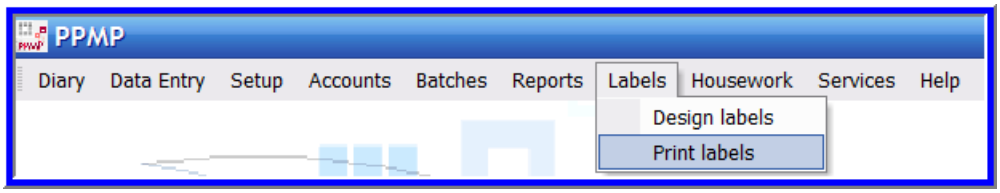
- Click on the “Preview” Tab

- This is a Preview of your label
- Exit out & Save Changes



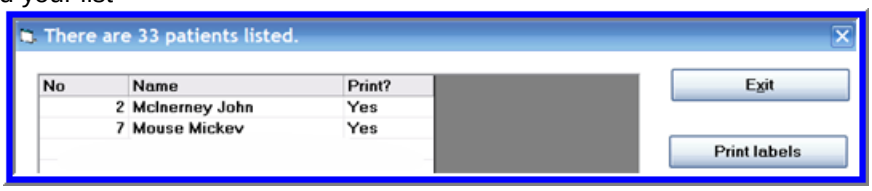
- Click OK

Back on PPMP Main Screen



- Select Labels
- Print Labels

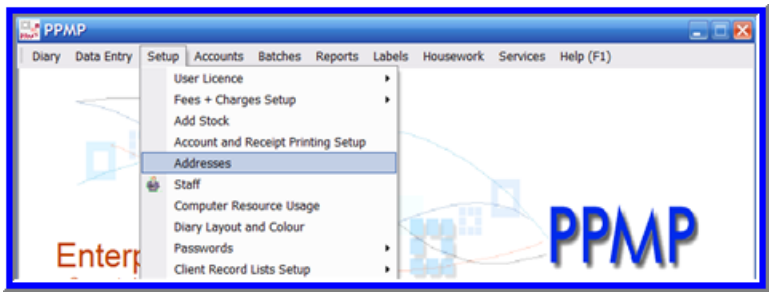
Build your list



- Select Print Labels

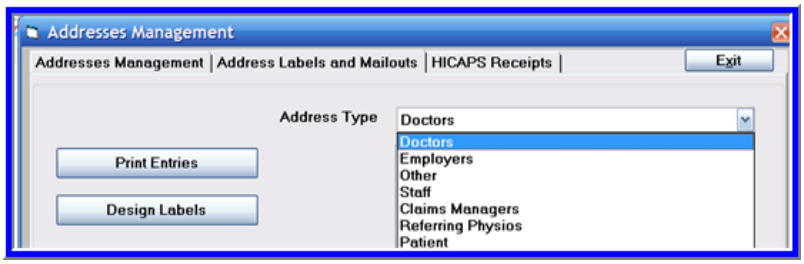
23.2 Lables Use

On the PPMP main menu

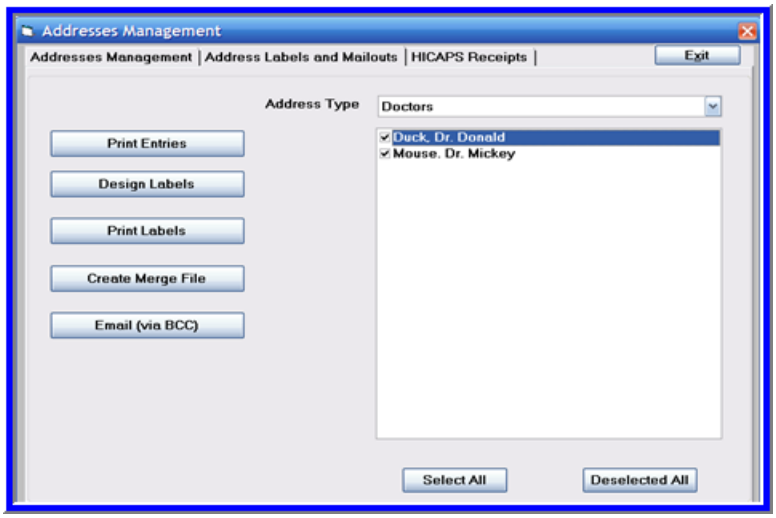


- Go to Setup
- Addresses

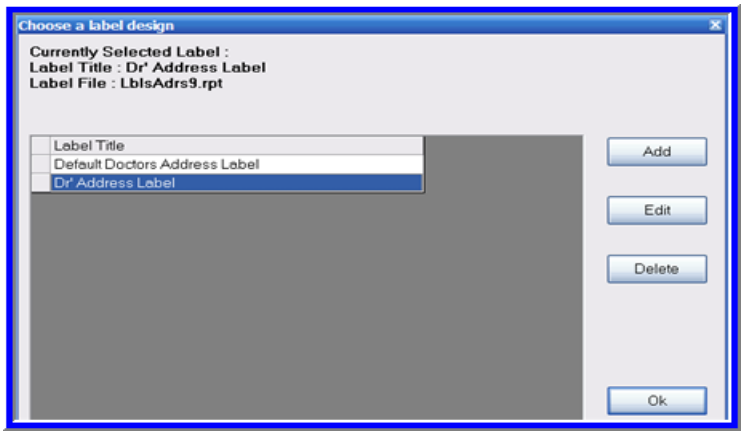
- Click on the Address Labels & Mailouts tab.
- Click Design Labels



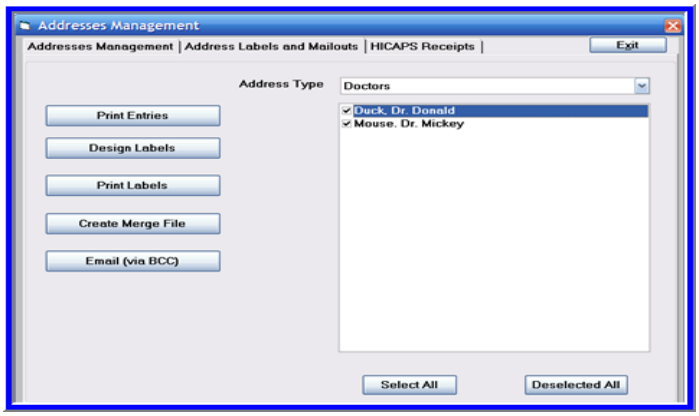
- Make a selection in the Address Types List



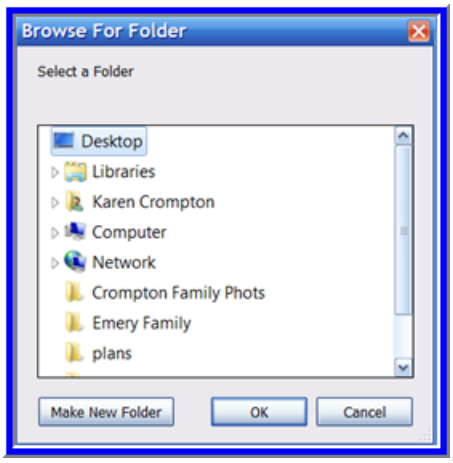
- Make your selections on the list (Deselect All and select the individuals you want or Select All)
- Print labels



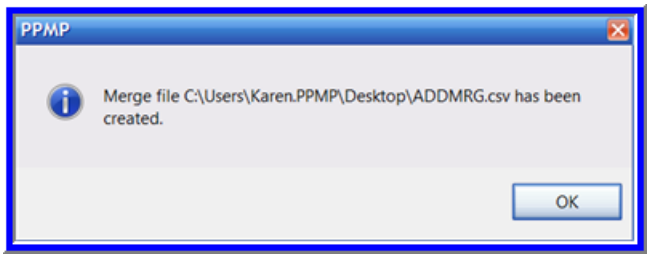
- Select Label
- Click OK
- Create a List of All Dr's Names & Addresses



- Select your List from Address Types
- Click Create Merge File

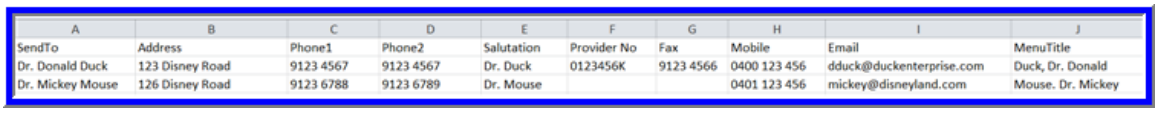


- Select where you would like to save your list



- Click OK

- Go to where you saved your list



A	B	C	D	E	F	G	H	I	J
SendTo	Address	Phone1	Phone2	Salutation	Provider No	Fax	Mobile	Email	MenuTitle
Dr. Donald Duck	123 Disney Road	9123 4567	9123 4567	Dr. Duck	0123456K	9123 4566	0400 123 456	dduck@duckenterprise.com	Duck, Dr. Donald
Dr. Mickey Mouse	126 Disney Road	9123 6788	9123 6789	Dr. Mouse			0401 123 456	mickey@disneyland.com	Mouse. Dr. Mickey

- View information saved

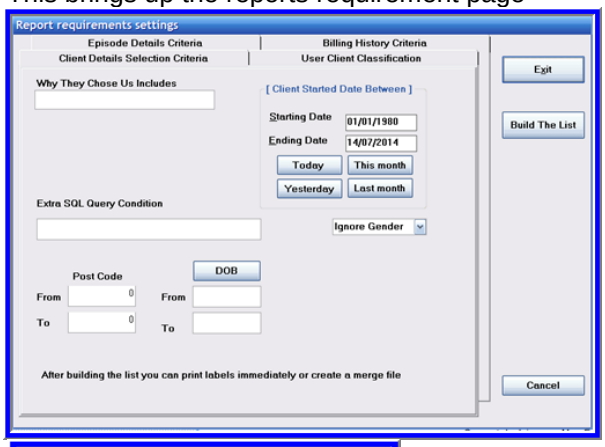
If you need any help with Mail Merge in Word try this link - http://support.microsoft.com/kb/294694

24 Mailout

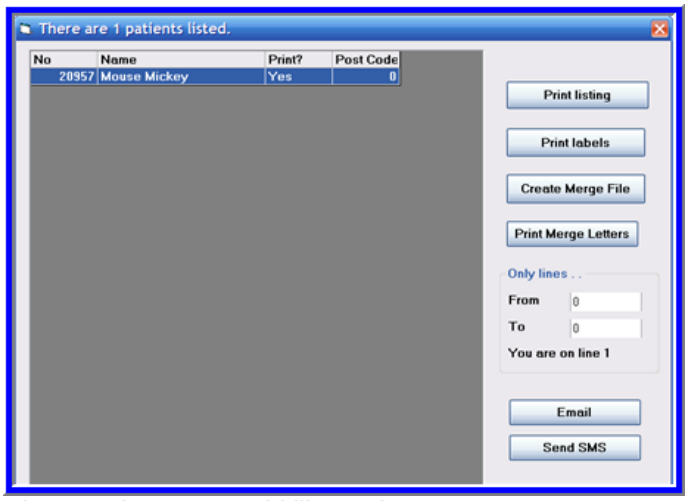
On the Main Screen PPMP

- Go to Reports
- Mailout

This brings up the reports requirement page



- Enter the date range – This relates to when the Client first attended your practice **– LEAVE AS IS IF YOU WANT ALL ON YOUR DATABASE**
- Then click Build the List



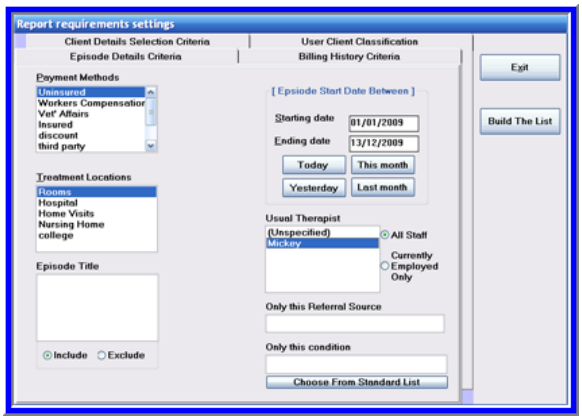
Choose what you would like to do: -

- Print Labels
- Create Merge File (will give you an excel spreadsheet with Names, Addresses, Phone numbers, DOB etc.)
- Print Merge Letters (Letters created in PPMP)
- Email
- SMS

24.1 Mailout new episodes

- Click Episode Details Criteria to narrow down your search

- Change the Episode start dates to list all clients who have episodes that started between your requested dates (if a client has more than 1 episode started between these dates they will appear on the list twice)

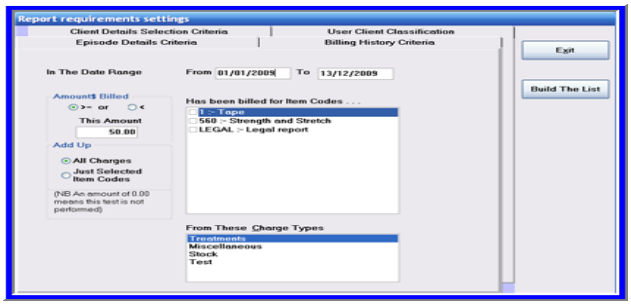


- If you want to narrow your search for a particular Payment Method or Practitioner - Select a Payment Method or charge type or Therapist
- Click Build This List

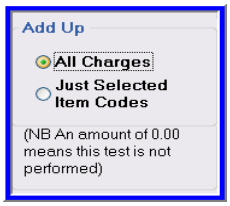
24.2 Mailout - List of clients that have spent above a certain dollar amount

- Click on Billing History Criteria

- Select your Date range



- By inserting a “dollar amount” in the Amount Billed section – this will give you a list of all clients that have been billed (e.g. $50.00) or more between the requested dates

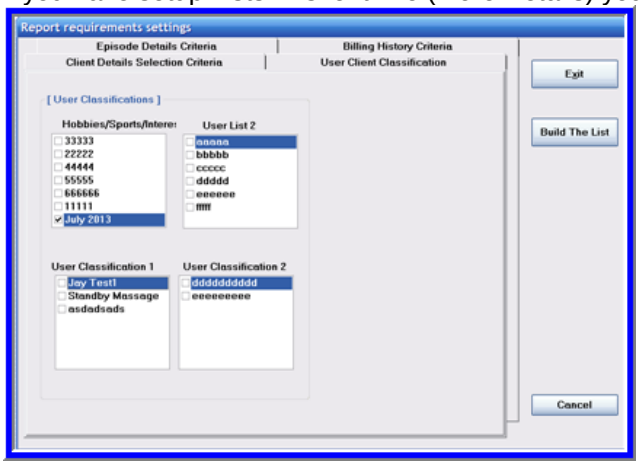


- Select ALL charges orJust Selected Item Codes - click on an Item Code and Charge Type from the List
- Click Build the List

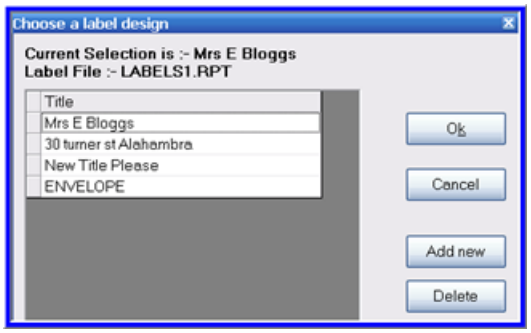
The above 3 steps can also be combined e.g.: you can select your client Start Dates from No:1 then select a Payment Method from No:2 and an amount from No:3 – Then Build the List

24.3 Mailout - User client classification

If you have setup Lists in Client File (More Details) you can also select from these list

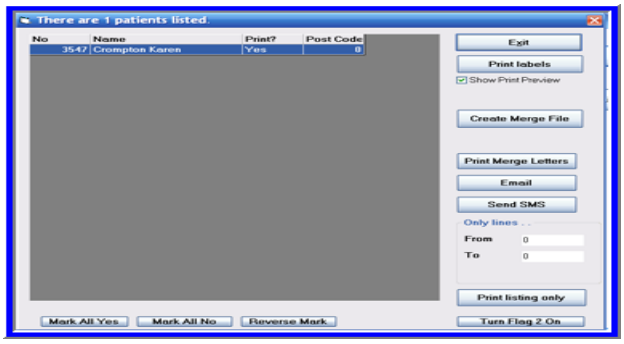


- Select from the List you have created
- Build the List
- This report only refers to what you have selected on your List (you can’t combine 2 lists)



- Click on Print Labels or Merge Letters
- Select the Label or Letter design you wish to print
- Click OK

NB: Before doing the mailout you can edit your list:-



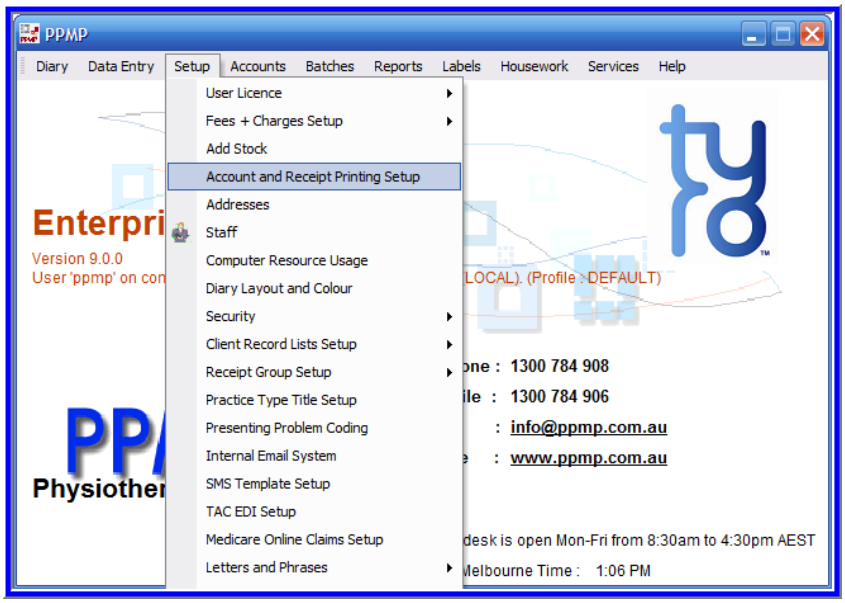
- Click on Yes in the Print column to change to No (or click No to change back to Yes)
- Patient's with No selected will not be included in Labels, Letters or emails.
- They will still appear on the List if you select Print Listing only (with NO in the Print Column).

- You can now select to either Print Listing, Print Labels, Print Merge Letters, Email or SMS

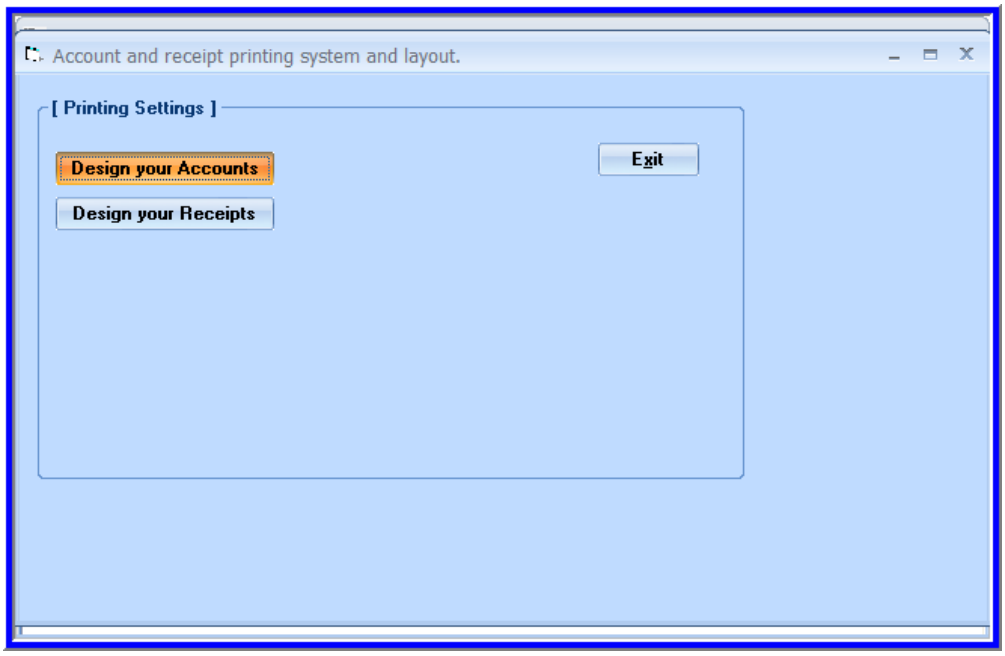
25 Printer setup for accounts & receipts

Click HERE to watch video

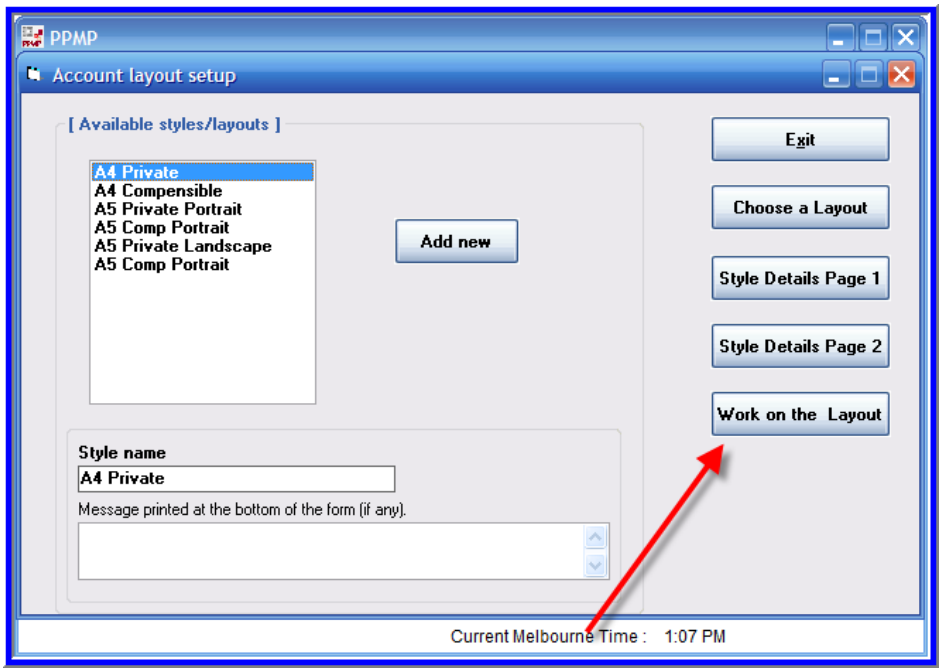
On the Main PPMP® Menu



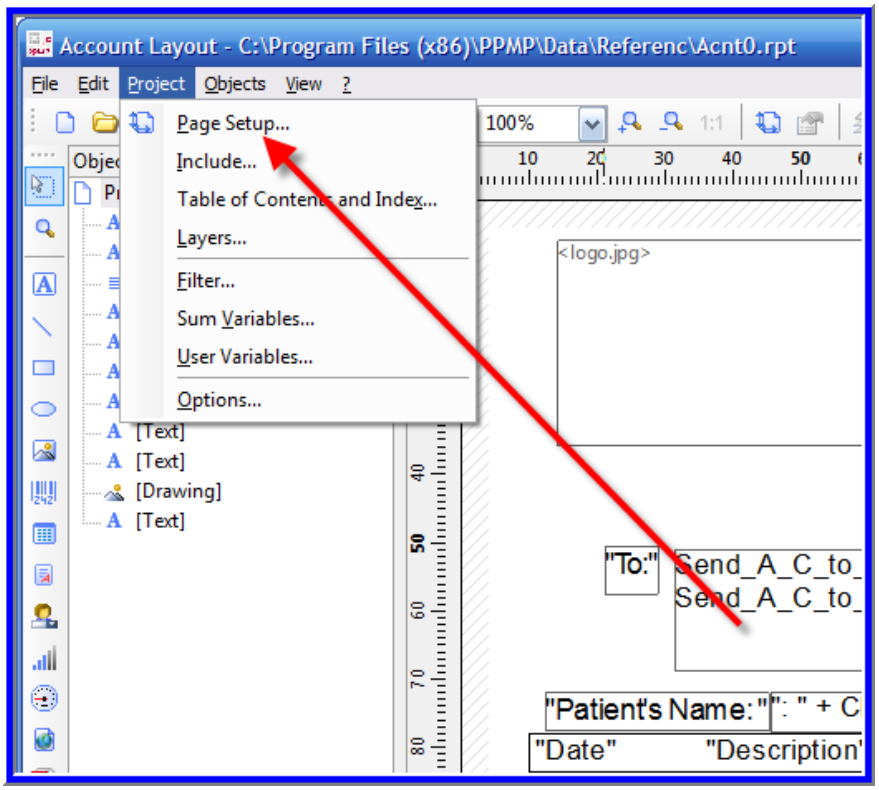
- select Setup
- Account & Receipt Printer Setup



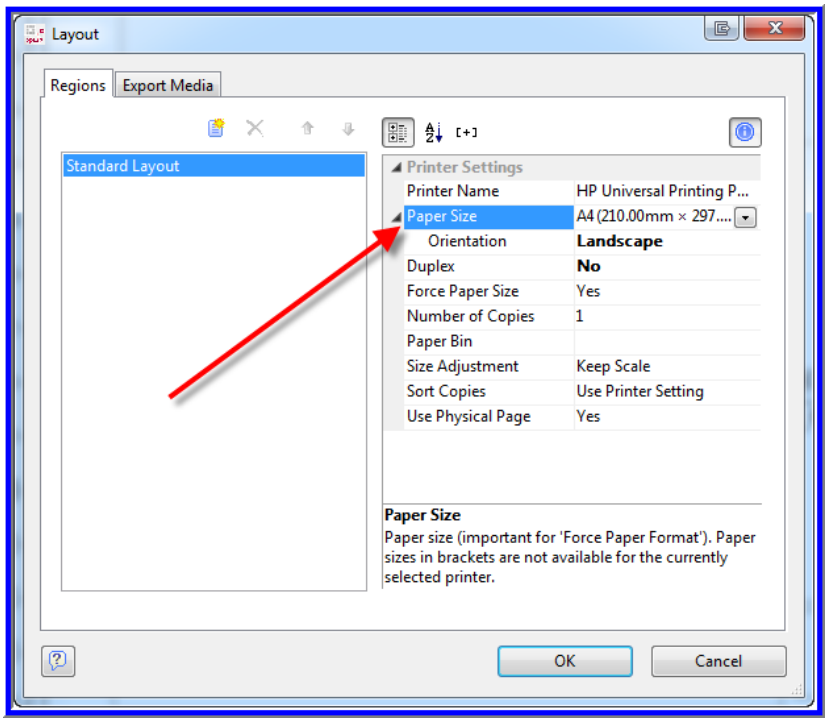
- Select Design your Accounts
- Select the account layout that you use (you may use a few, you will need to repeat steps)



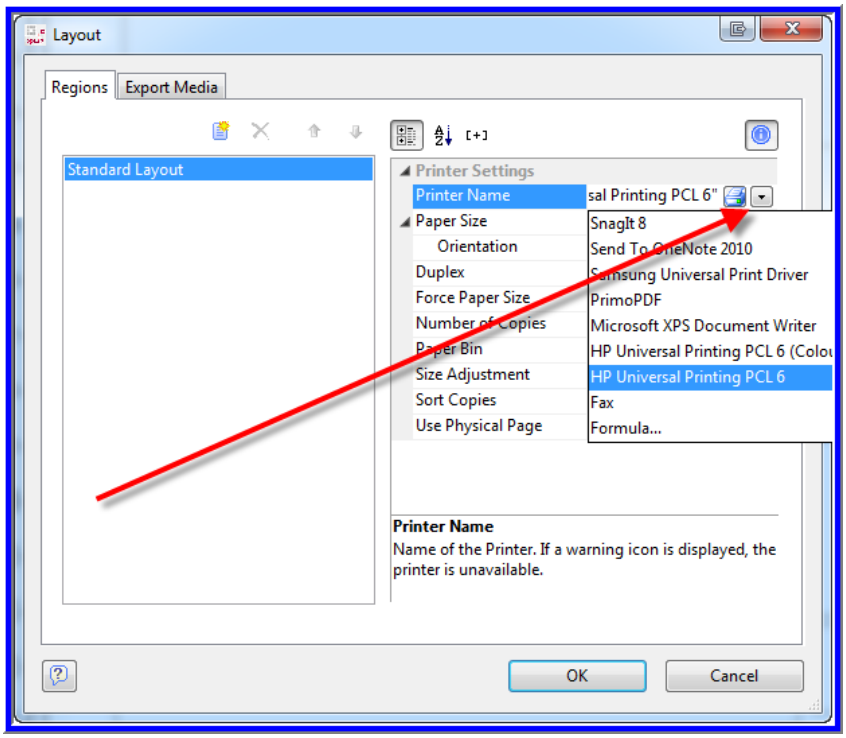
- Click Work on the Layout.



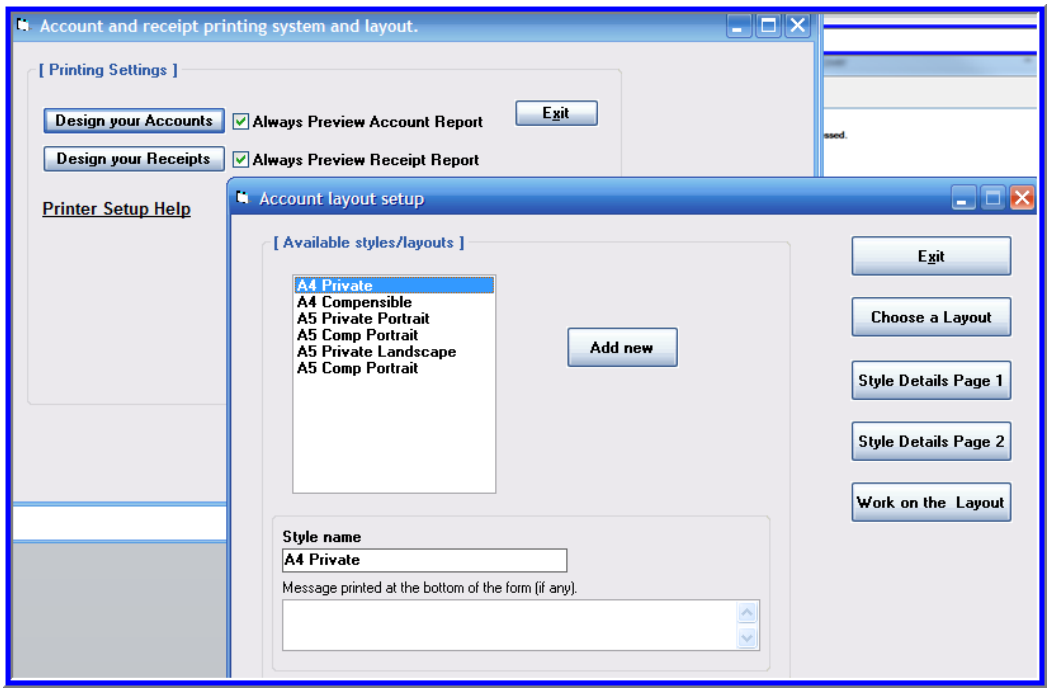
- The design will open, select Project then Page Setup



- Select Paper size
- Select Orientation and other setting for your printer can all be selected in here.



- Click the drop down box to bring up a list of printers on your computer and select the one you wish to use.
- When you are happy with your entire selections click “OK” to save your settings.

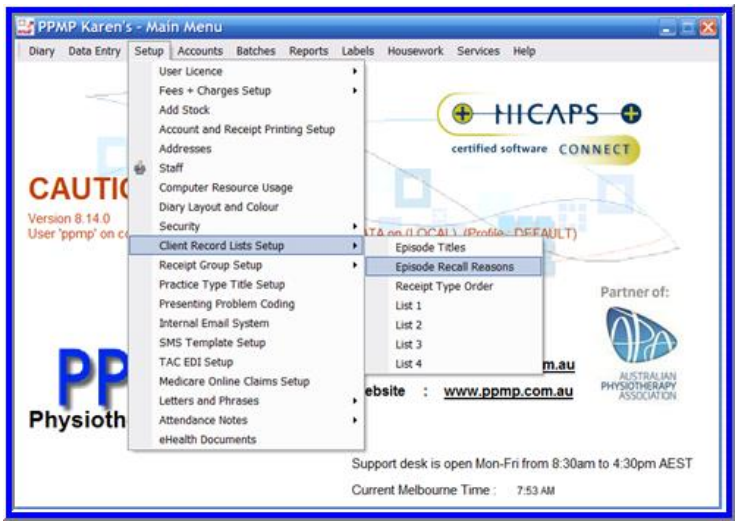


- Repeat steps for all Account & Receipt layouts that you use.

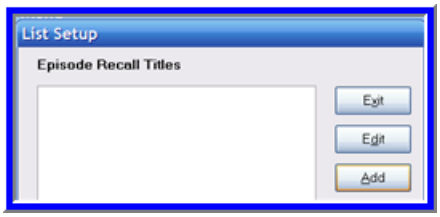
26 Recalls

26.1 Create your own recall reasons

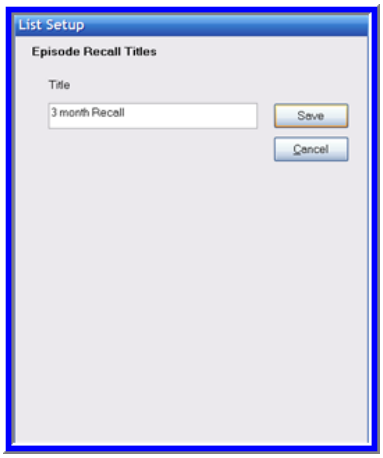
On the Main screen of PPMP



- Click on Setup
- Client Record Lists Setup
- Episode Recall Reasons



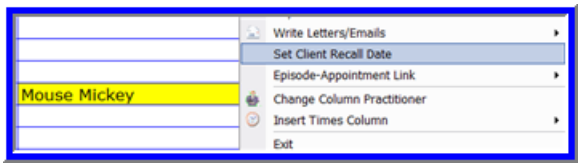
- Click Add



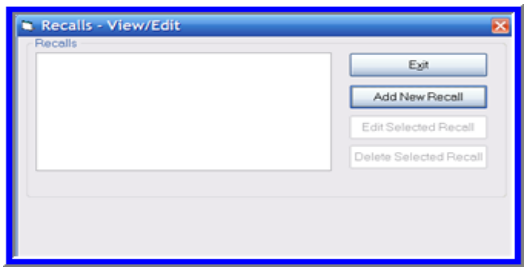
- Enter a Recall Title Name
- Click Save

- Click Exit

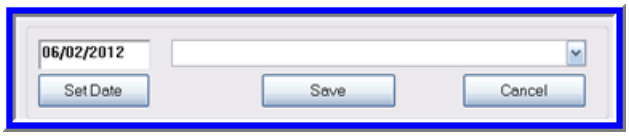
26.2 Setting recalls



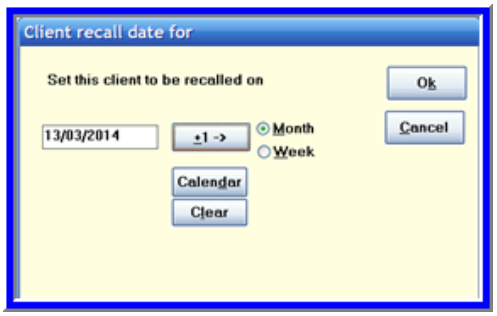
- Right Click on client's name (from the diary)
- Click Set Client Recall Date



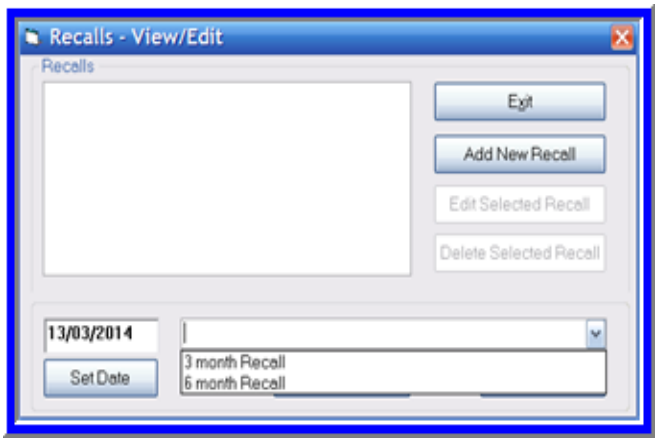
- Click Add New Recall



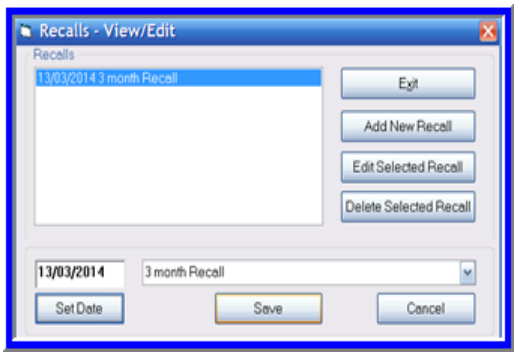
- Click Set date



- Set the date (either click ahead Month or Weeks or click Calendar to select date)
- Click OK



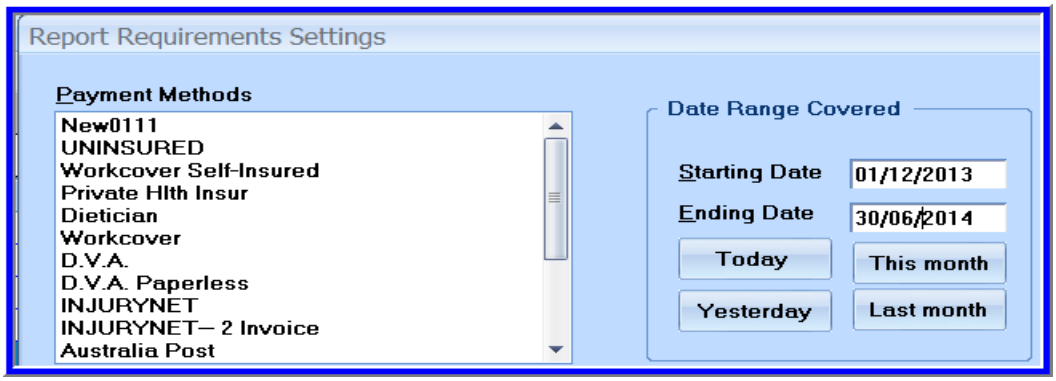
- Select Recall reason from drop down list or type in a different reason



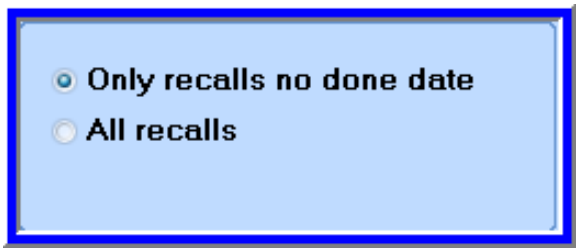
- Click Save
- Click Exit

26.3 To view/action recalls

- Click Reports
- Recalls
- Issue recalls

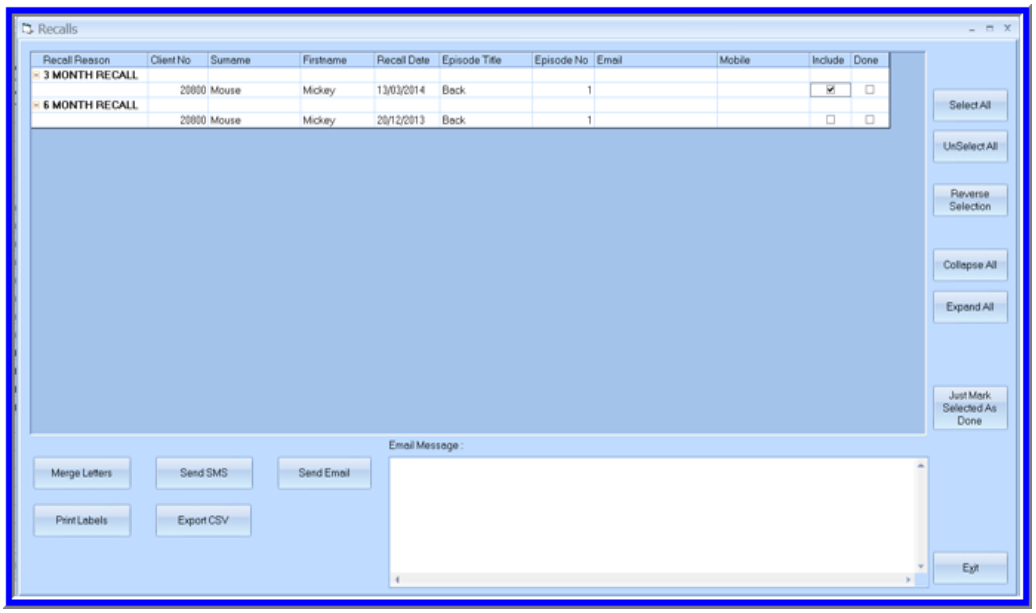


- Select Date Range

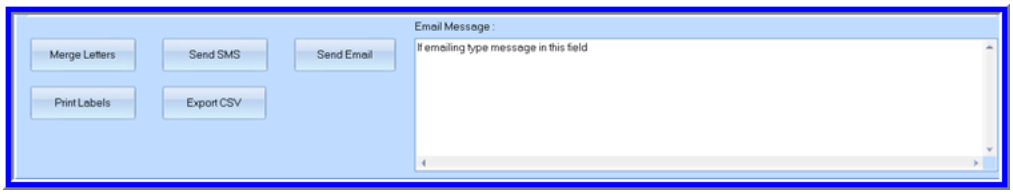


- Select Only Recalls – no done date

- Select Recall Reason (or leave blank for ALL recall reasons)
- Display



- Tick the Recalls to include

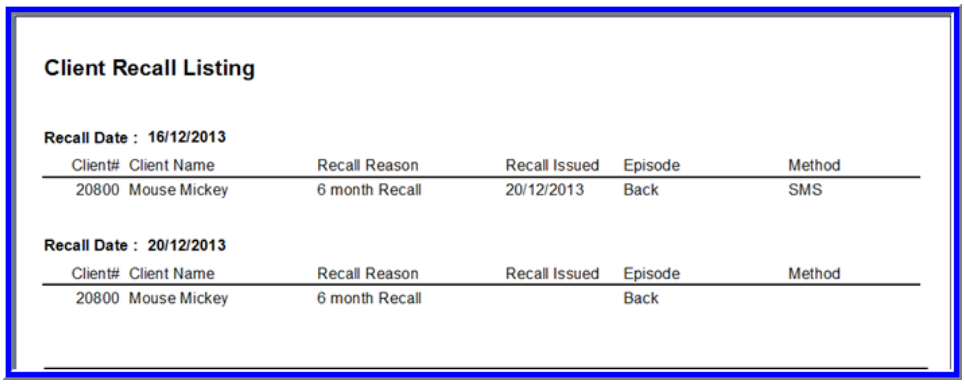


- Select from Options - Merge Letters /Send SMS/ Send Email / Print Labels / Export CSV.

OR

- Click Just Mark Selected as Done
- Exit

26.4 Selecting recalls by date



Client Recall Listing

Recall Date : 16/12/2013

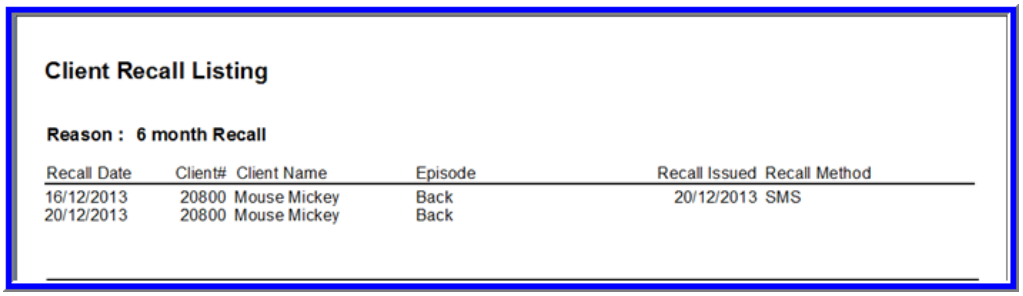
Client#	Client Name	Recall Reason	Recall Issued	Episode	Method
20800	Mouse Mickey	6 month Recall	20/12/2013	Back	SMS

Recall Date : 20/12/2013

Client#	Client Name	Recall Reason	Recall Issued	Episode	Method
20800	Mouse Mickey	6 month Recall		Back	

- All recalls will be listed– Including recalls sent Indicating how they were notified.

26.5 Selecting recalls by reason



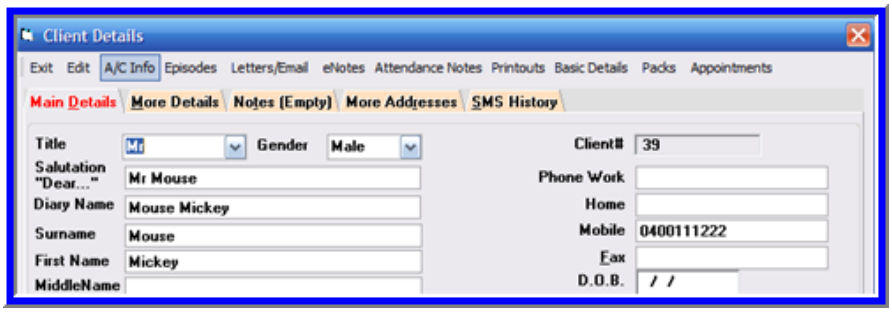
Client Recall Listing

Reason : 6 month Recall

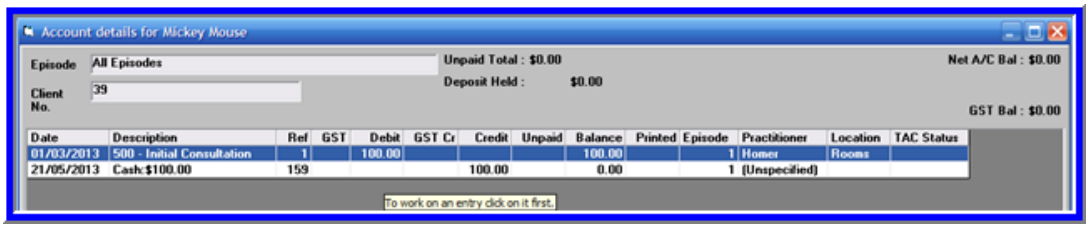
Recall Date	Client#	Client Name	Episode	Recall Issued	Recall Method
16/12/2013	20800	Mouse Mickey	Back	20/12/2013	SMS
20/12/2013	20800	Mouse Mickey	Back		

- All recalls will be listed– Including recalls sent Indicating how they were notified.

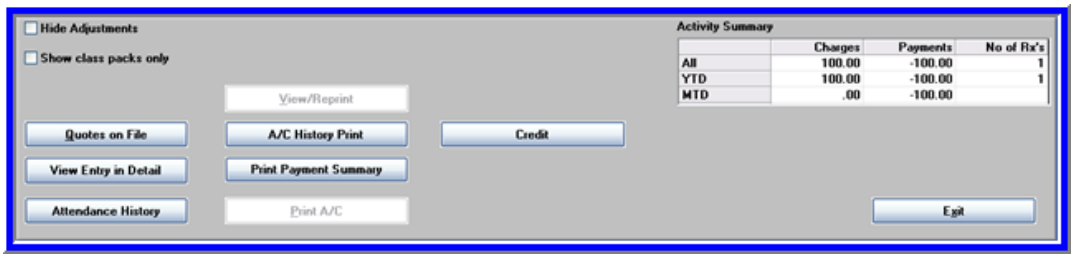
27 Refunds / Credits



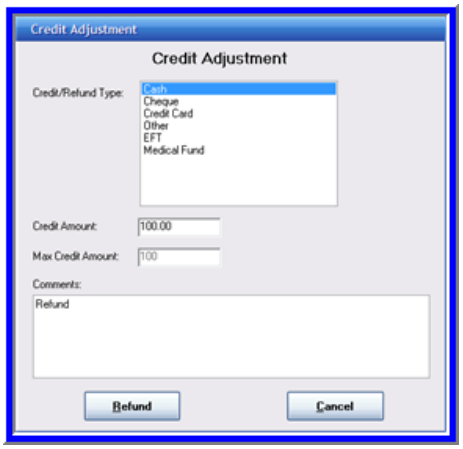
- Open Client Details Screen
- Click A/C Info


Account details for Mickey Mouse
Episode All Episodes
Client No. 39
Unpaid Total : $0.00
Deposit Held : $0.00
Net A/C Bal : $0.00
GST Bal : $0.00
Date Description Ref GST Debit GST Cr Credit Unpaid Balance Printed Episode Practitioner Location TAC Status
01/03/2013 500 - Initial Consultation 1 100.00 100.00 1 Homer Rooms
21/05/2013 Cash:$100.00 159 100.00 0.00 1 (Unspecified)
To work on an entry click on it first.

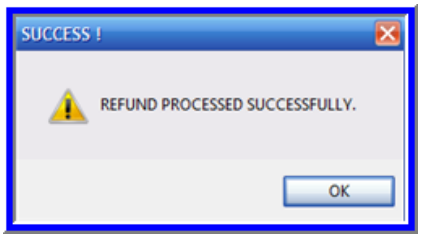
- Click on the Treatment Charge



- Click Credit Button



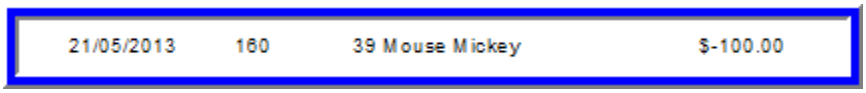
- Select Credit/Refund Type
- Enter amount being refunded
- Enter comment relating to refund (e.g. why it is being refunded)
- Click Refund



- Refund Processed Successfully
- Click OK
- Exit

Account details for Mickey Mouse
Episode All Episodes
Client No. 39
Unpaid Total : $0.00
Deposit Held : $0.00
Net A/C Bal : $0.00
GST Bal : $0.00
Date Description Ref GST Debit GST Cr Credit Unpaid Balance Printed Episode Practitioner Location TAC Status
01/03/2013 500 - Initial Consultation 1 100.00 100.00 1 Homer Rooms
21/05/2013 Cash:$100.00 159 100.00 0.00 1 (Unspecified)
21/05/2013 PAYOUT : $100.00, Refu... CRD 100.00 (100.00) 1 Homer
21/05/2013 Credit balanced against P... 100.00 0.00 1 (Unspecified)

- Client A/C Info screen shows Payout etc.
- Check your Banking report and Activity Reports for adjustments.

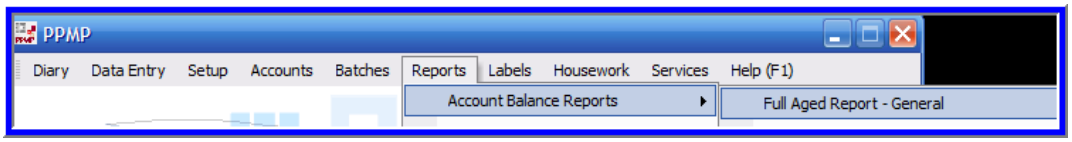


- All reports show negative / refunded amounts

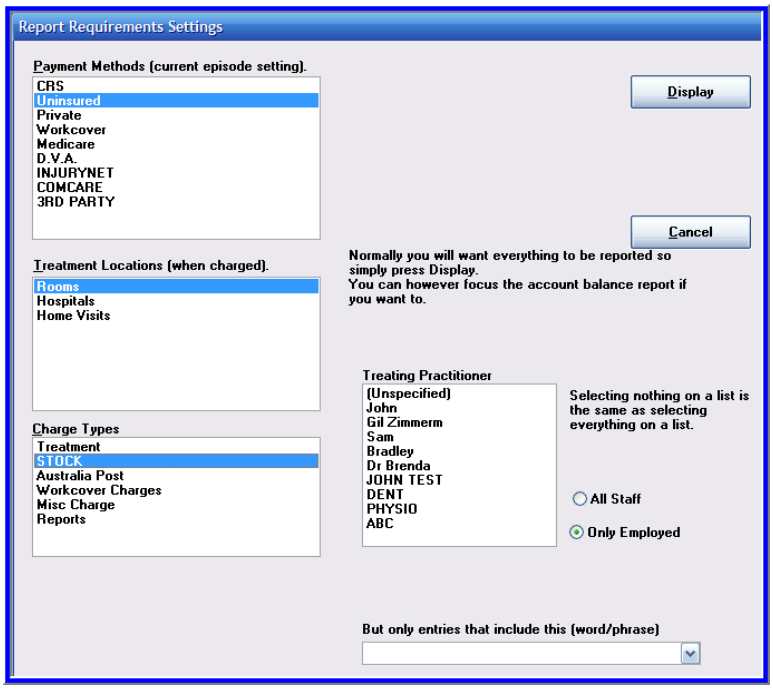
28 Reports

28.1 Accounts balance

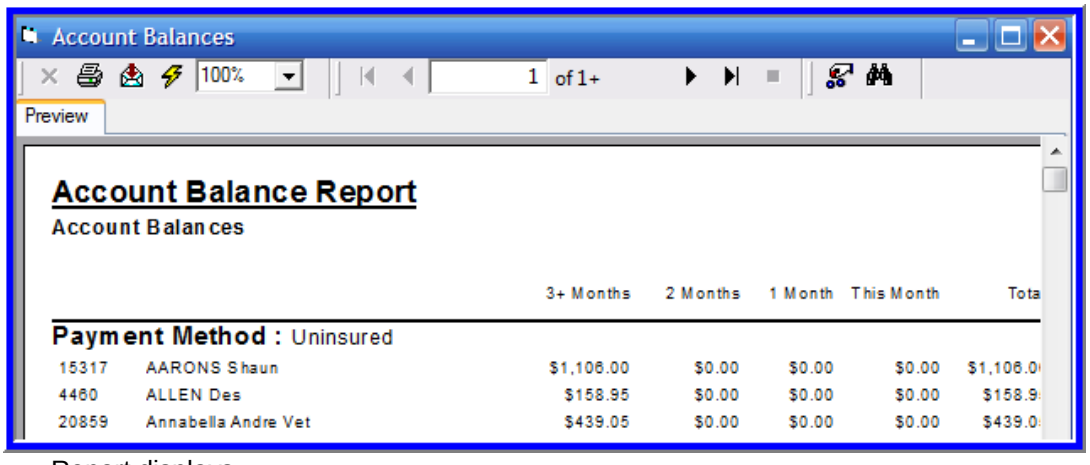
On the Main screen of PPMP®



- Reports
- Account Balance Reports
- Full Aged Report General



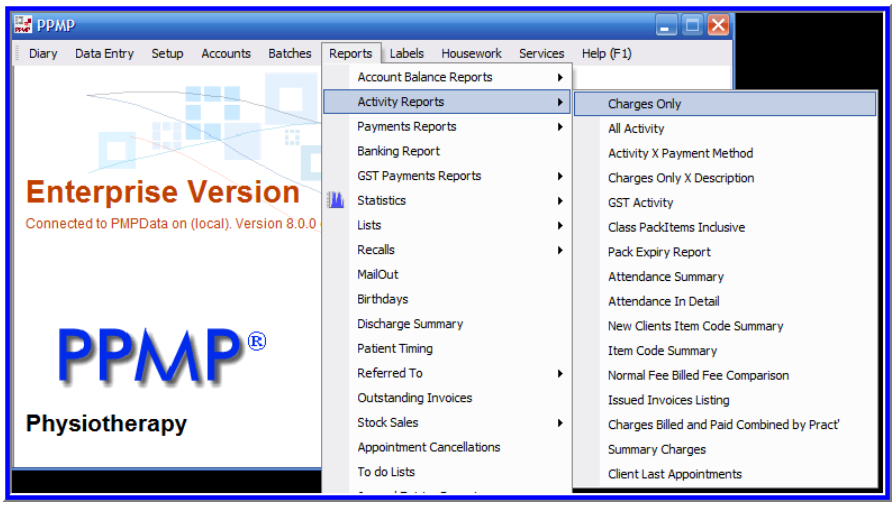
- Select required fields or leave blank for everything
- Click Display



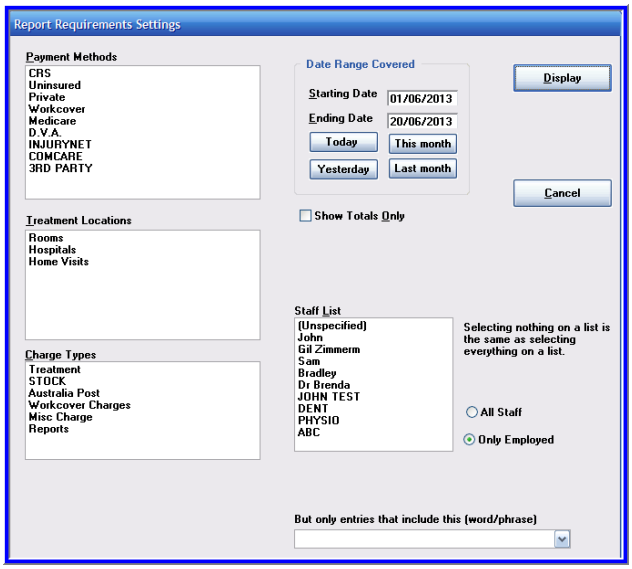
- Report displays

28.2 Activity report

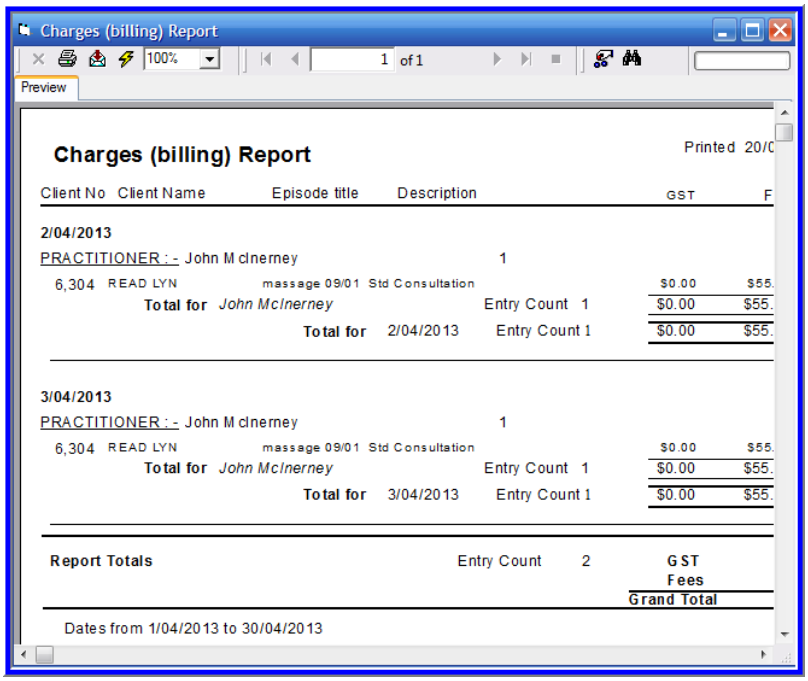
On the Main screen of PPMP®



- Reports
- Activity Reports
- Select desired report from this list
- New menu will appear



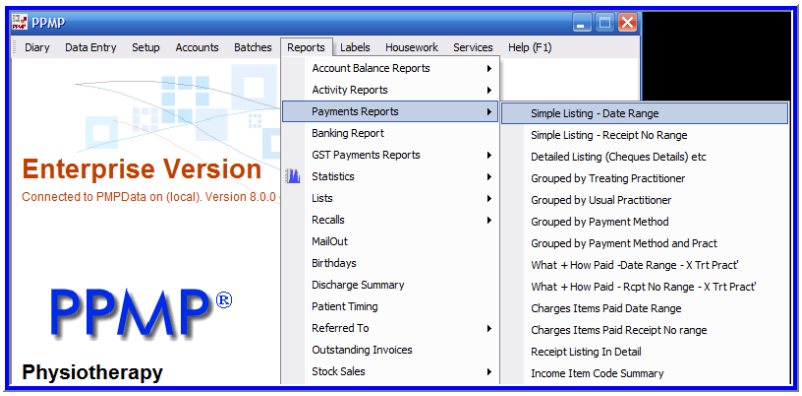
- Select required fields and date range
- Click Display


Charges (billing) Report
100%
1 of 1
Preview
Charges (billing) Report
Printed 20/0
Client No Client Name Episode title Description GST F
2/04/2013
PRACTITIONER : - John Mclnerney 1
6,304 READ LYN massage 09/01 Std Consultation $0.00 $55.
Total for John McInerney Entry Count 1 $0.00 $55.
Total for 2/04/2013 Entry Count 1 $0.00 $55.
3/04/2013
PRACTITIONER : - John Mclnerney 1
6,304 READ LYN massage 09/01 Std Consultation $0.00 $55.
Total for John McInerney Entry Count 1 $0.00 $55.
Total for 3/04/2013 Entry Count 1 $0.00 $55.
Report Totals Entry Count 2
GST
Fees
Grand Total
Dates from 1/04/2013 to 30/04/2013

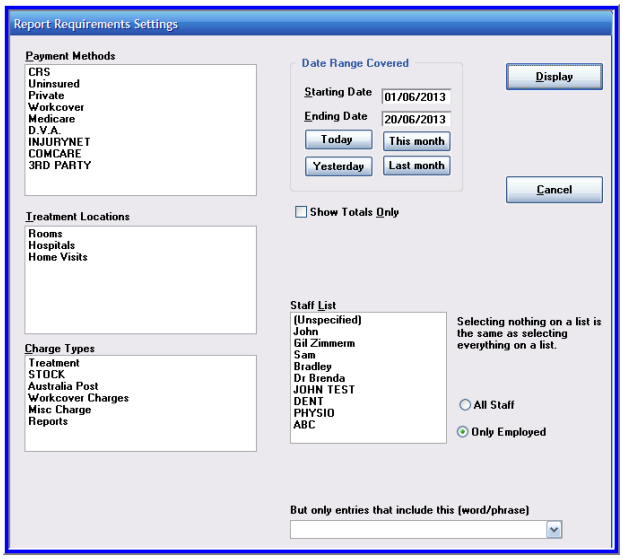
- Report displays

28.3 Payments report

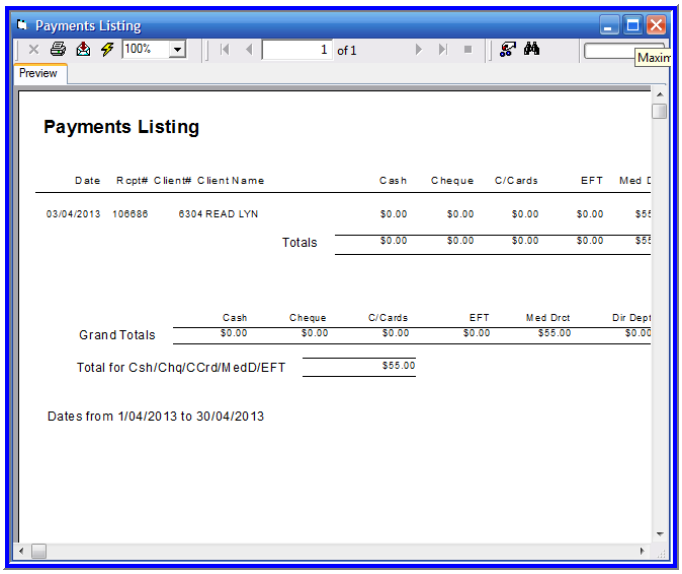
On the Main screen of PPMP®



- Reports
- Payment Reports
- Select desired report from this list
- New menu will appear



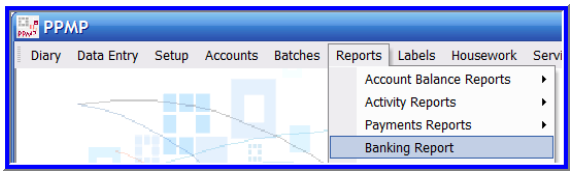
- Select required fields and date range.
- Click Display


Payments Listing
Preview
Payments Listing
Date Rcpt# Client# Client Name Cash Cheque C/Cards EFT
03/04/2013 106686 6304 READ LYN $0.00 $0.00 $0.00 $0.00
Totals $0.00 $0.00 $0.00 $0.00
Cash Cheque C/Cards EFT Med Drct Dir Dept
Grand Totals $0.00 $0.00 $0.00 $0.00 $55.00 $0.00
Total for Csh/Chq/CCrd/MedD/EFT $55.00
Dates from 1/04/2013 to 30/04/2013

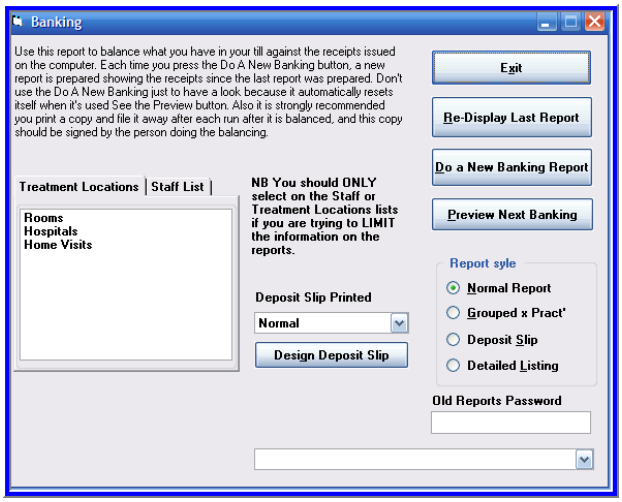
- Report displays

28.4 Banking

On the Main screen of PPMP®

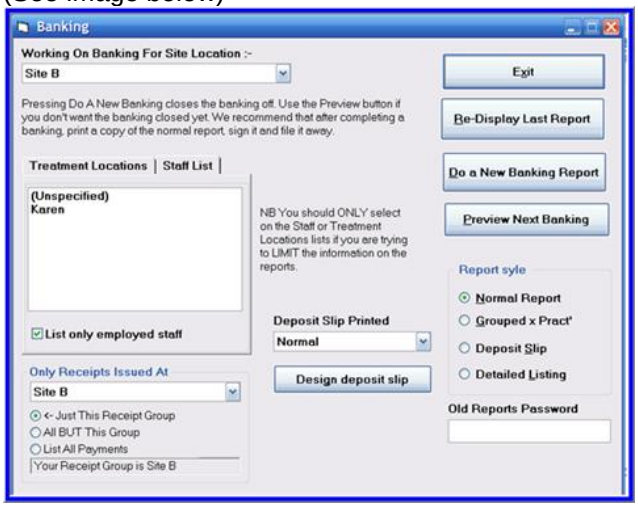


- Reports
- Banking Report


Banking
Use this report to balance what you have in your till against the receipts issued on the computer. Each time you press the Do A New Banking button, a new report is prepared showing the receipts since the last report was prepared. Don't use the Do A New Banking just to have a look because it automatically resets itself when it's used See the Preview button. Also it is strongly recommended you print a copy and file it away after each run after it is balanced, and this copy should be signed by the person doing the balancing.
Exit
Re-Display Last Report
Do a New Banking Report
Preview Next Banking
Treatment Locations
Staff List
Rooms
Hospitals
Home Visits
NB You should ONLY select on the Staff or Treatment Locations lists if you are trying to LIMIT the information on the reports.
Report syle
Normal Report
Grouped x Pract'
Deposit Slip
Detailed Listing
Deposit Slip Printed
Normal
Design Deposit Slip
Old Reports Password

- Click – Preview next Banking - to balance all money OR
- Do a new Banking Report – when you are going to the bank.
- Select Deposit Slip – to view Cheque & Cash Amounts to be banked

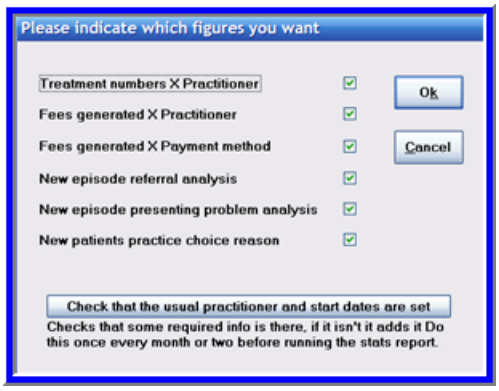
NB: If you have Alternate Banking Sites set – you can select to do preview banking reports for each different site. (See image below)


Banking
Working On Banking For Site Location :-
Site B
Exit
Pressing Do A New Banking closes the banking off. Use the Preview button if you don't want the banking closed yet. We recommend that after completing a banking, print a copy of the normal report, sign it and file it away.
Re-Display Last Report
Do a New Banking Report
Preview Next Banking
Treatment Locations
Staff List
(Unspecified)
Karen
List only employed staff
NB You should ONLY select on the Staff or Treatment Locations lists if you are trying to LIMIT the information on the reports.
Report syle
Normal Report
Grouped x Pract'
Deposit Slip
Detailed Listing
Deposit Slip Printed
Normal
Design deposit slip
Old Reports Password
Only Receipts Issued At
Site B
<- Just This Receipt Group
All BUT This Group
List All Payments
Your Receipt Group is Site B

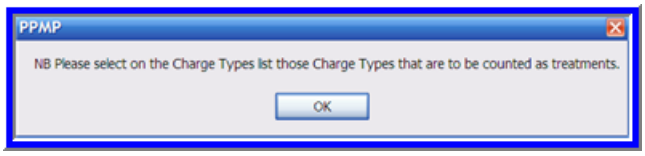
28.5 Statistics report

On the Main Screen of PPMP®

- Go to Reports
- Statistics
- Statistics – Combined Figures


Please indicate which figures you want
Treatment numbers X Practitioner
Fees generated X Practitioner
Fees generated X Payment method
New episode referral analysis
New episode presenting problem analysis
New patients practice choice reason
Ok
Cancel
Check that the usual practitioner and start dates are set
Checks that some required info is there, if it isn't it adds it Do this once every month or two before running the stats report.

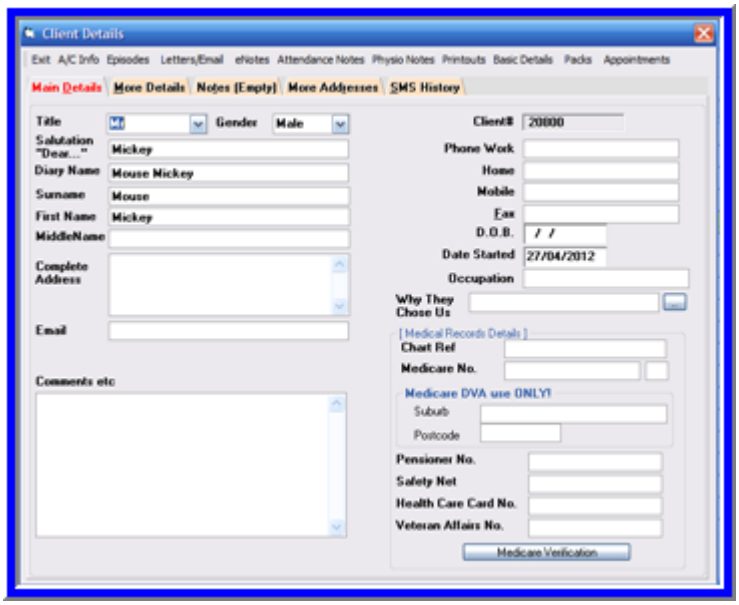
- Select items you want to show on report
- Click OK



- Click OK

29 Scanning and attatching documents to client files

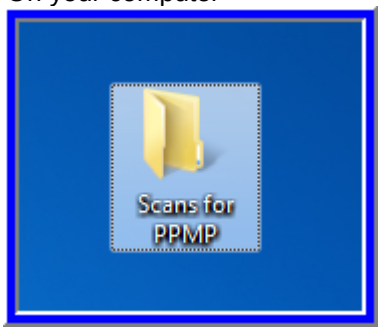
Click HERE to watch video



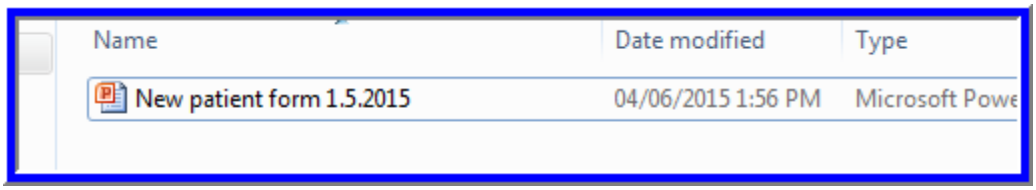
- Open Client Details
- Click Episodes
- Click Documents

If you receive new patient forms and other documentation regarding your clients and you would like to save them in your clients file:

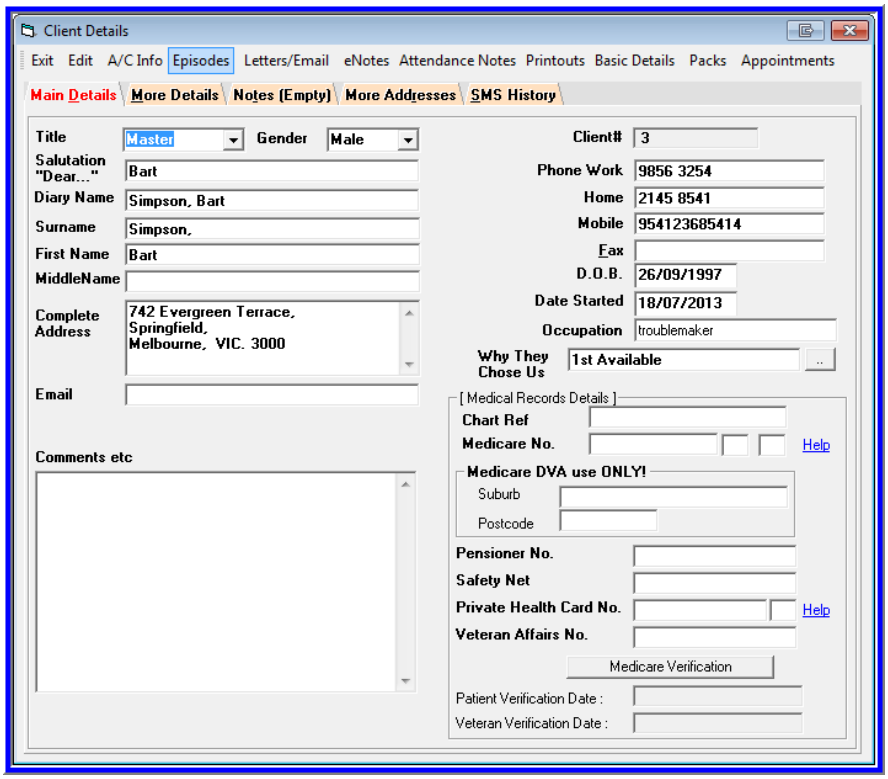
On your computer



- Make a folder on your Desktop (or My Documents)

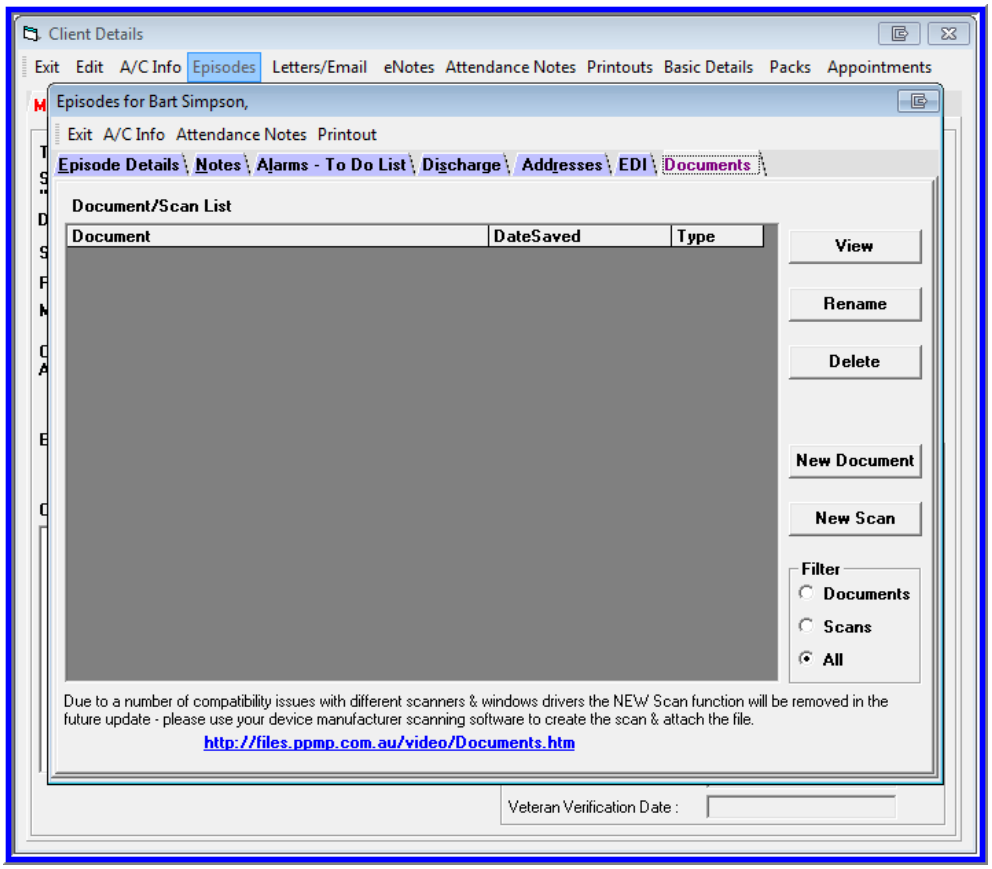


- Scan and save the original to that folder – giving it a specific name.



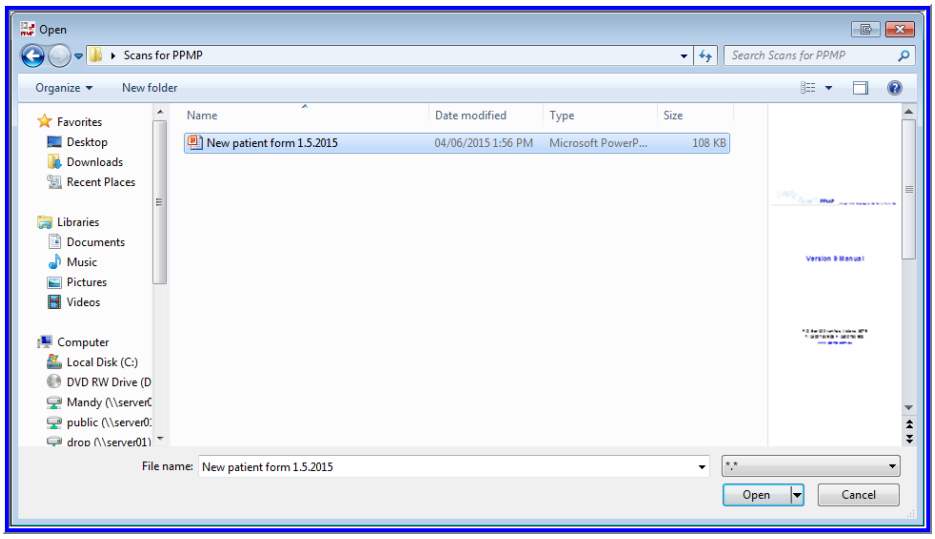
- Open your client file
- Go to Episodes tab

- Select the Correct Episode from the list

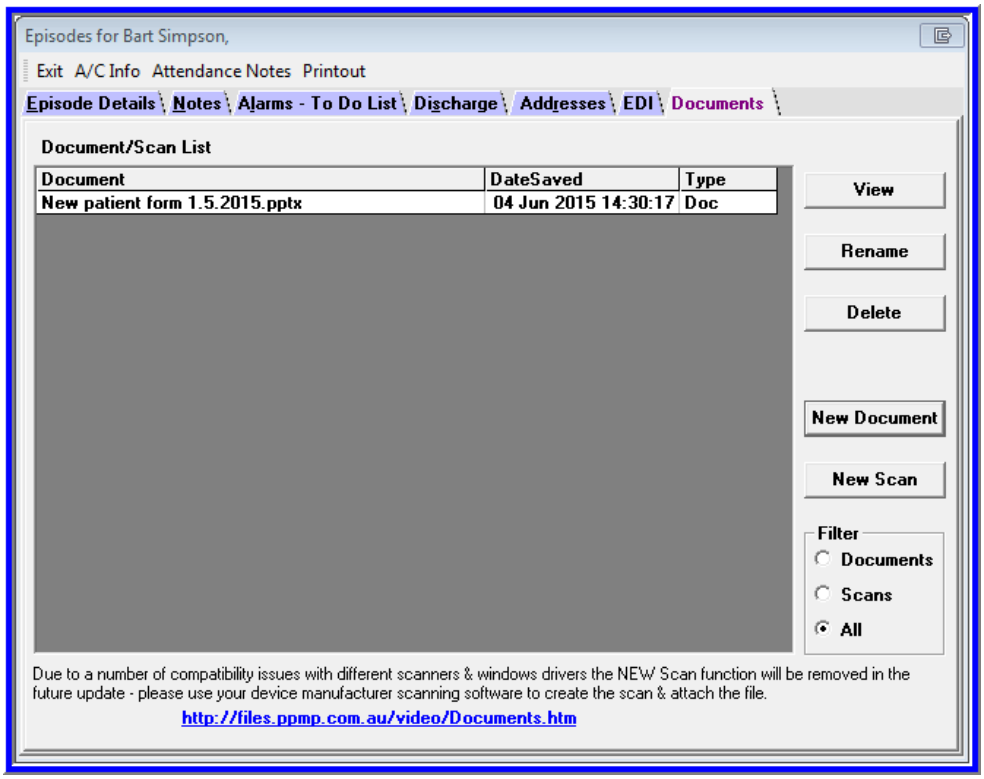

Client Details
Exit Edit A/C Info Episodes Letters/Email eNotes Attendance Notes Printouts Basic Details Packs Appointments
Episodes for Bart Simpson,
Exit A/C Info Attendance Notes Printout
Episode Details Notes Alarms - To Do List Discharge Addresses EDI Documents
Document/Scan List
Document DateSaved Type
View
Rename
Delete
New Document
New Scan
Filter
Documents
Scans
All
Due to a number of compatibility issues with different scanners & windows drivers the NEW Scan function will be removed in the future update - please use your device manufacturer scanning software to create the scan & attach the file.
http://files.ppmp.com.au/video/Documents.htm
Veteran Verification Date :

- Click Documents

- Click New Document



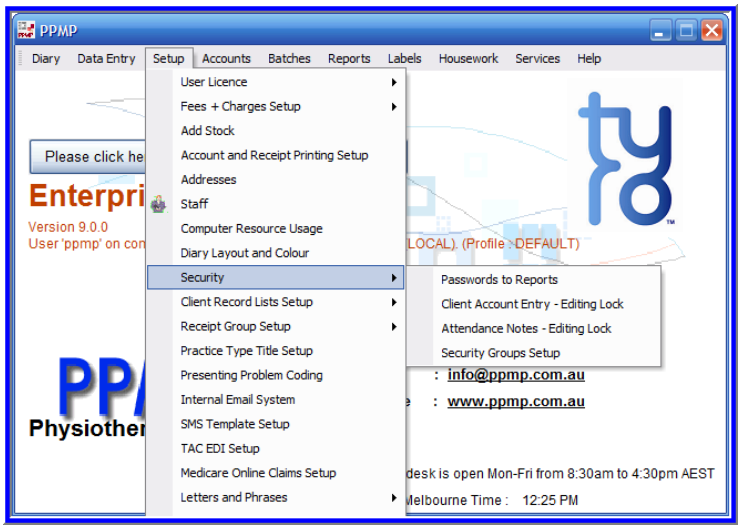
- Go to the new folder you created on the computer
- Select Document
- Click Open


Episodes for Bart Simpson,
Exit A/C Info Attendance Notes Printout
Episode Details Notes Alarms - To Do List Discharge Addresses EDI Documents
Document/Scan List
Document
DateSaved
Type
New patient form 1.5.2015.pptx
04 Jun 2015 14:30:17
Doc
View
Rename
Delete
New Document
New Scan
Filter
Documents
Scans
All
Due to a number of compatibility issues with different scanners & windows drivers the NEW Scan function will be removed in the future update - please use your device manufacturer scanning software to create the scan & attach the file.
http://files.ppmp.com.au/video/Documents.htm

- Go back to the Document List
- Select the Item from the list
- Click View to see the document in its entirety

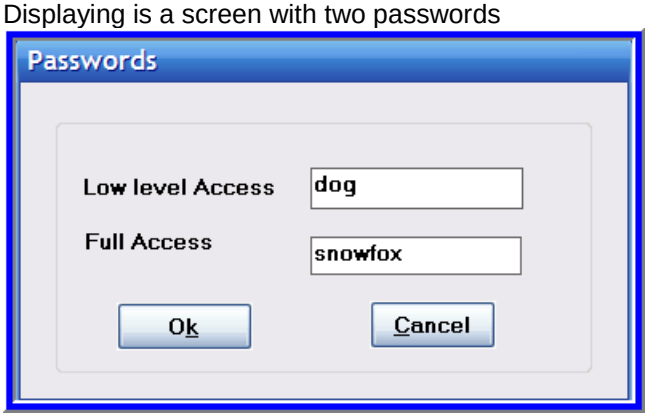
30 Security & passwords

30.1 To set passwords to reports



- Click on 'Setup' on the main menu
- Click on 'Security'
- Click on 'Passwords to reports'.

Displaying is a screen with two passwords



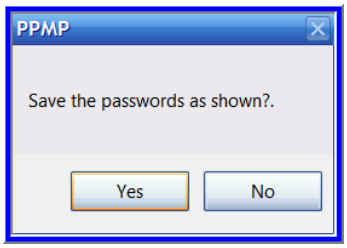
- Click OK

Low level access

- The password put in this field will allow you access to all the reports.

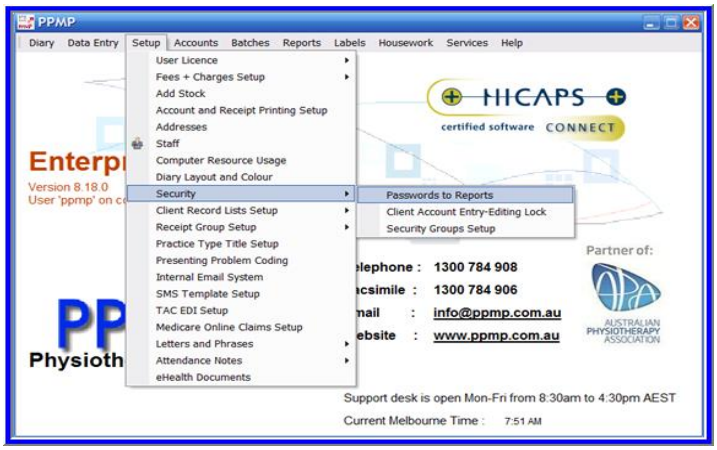
Full access

- The password put in this field, will allow you to change both the Low level access and Full access passwords.



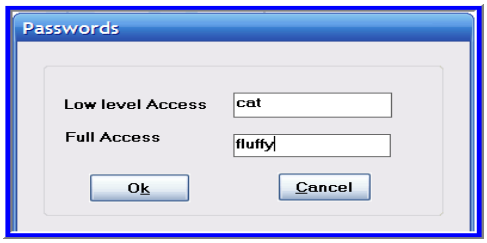
- Click Yes

30.2 Changing passwords

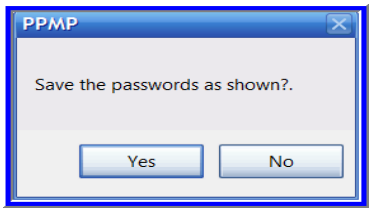


- Click on Setup
- Passwords
- Passwords to reports

- Type in your Full access password
- Click OK



- You can then change the passwords



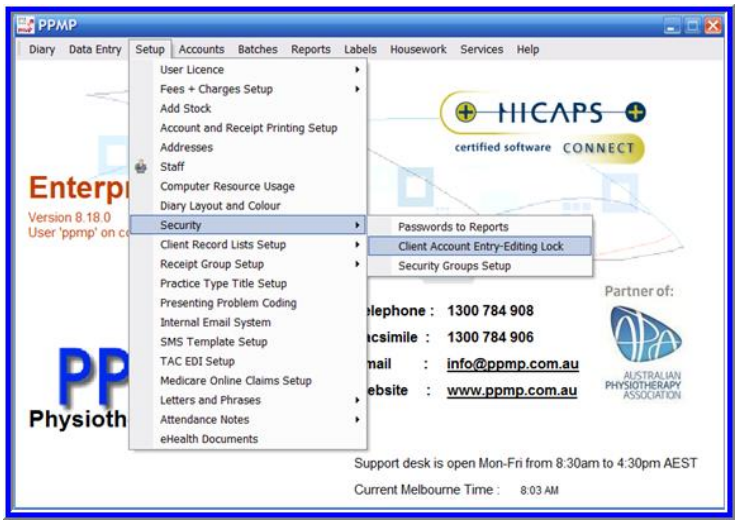
- Click Yes

- Go to Reports
- Paynments Report
- Simple Listing Date Range

- Enter your “Low Level” Password (frog)
- Click OK
- Continue to your report

30.3 Account Edits Lock Setting

Stop people from making changes to information in a client’s account history screen so that a password is required to make these changes.



- Click 'Setup' on the main menu for PPMP
- Click 'Security'
- Click 'Client account entry - editing Lock'.

- If this option is selected then PPMP will not ask you for a password if you want to edit a patient’s account file.
- Require password after * days

- If this option is selected then PPMP will ask for a password after the amount (*) of days has passed.
- Therefore if you want the password to be asked for every time there is a change made in the clients account information screen, set the days to 0. Otherwise you will only be asked after the number of days specified have passed.

30.4 Attendance notes and editing

This section is there in preparation for Future Development

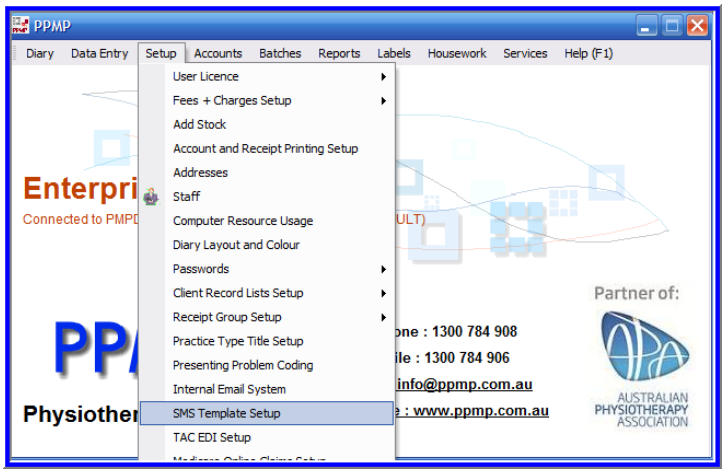
30.5 Security group setup

This section is there in preparation for Future Development

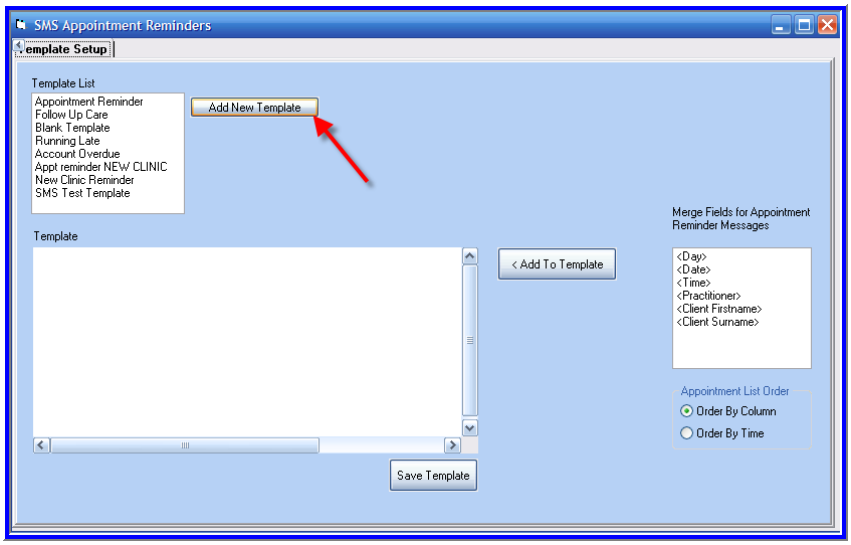
31 SMS

31.1 SMS template setup

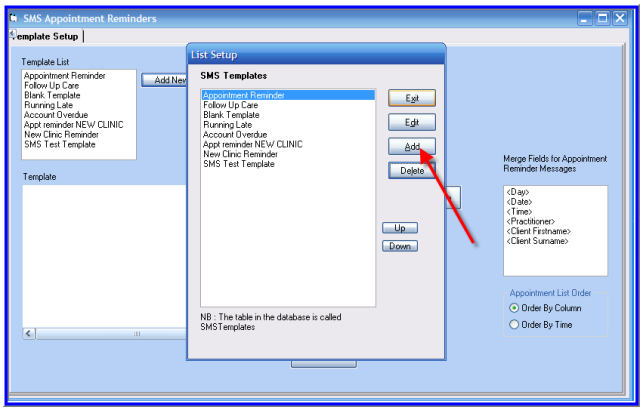
On the Main Menu PPMP®



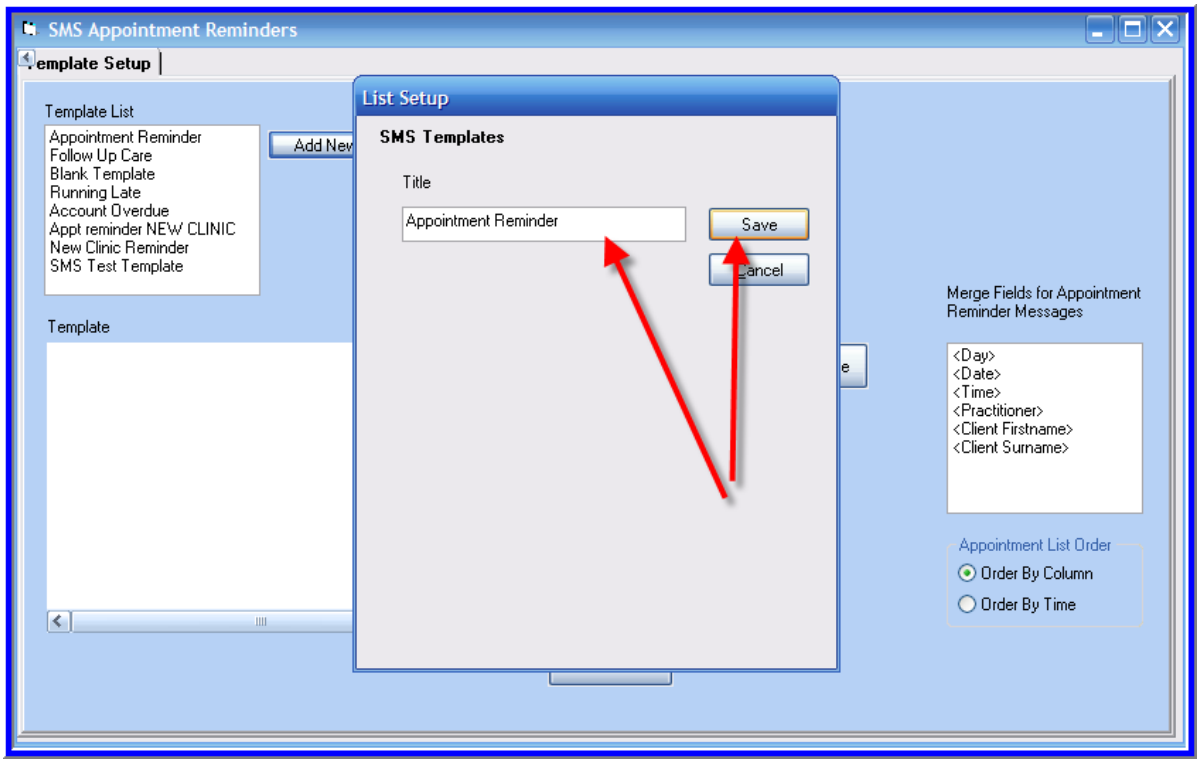
- Go to SMS Template Setup



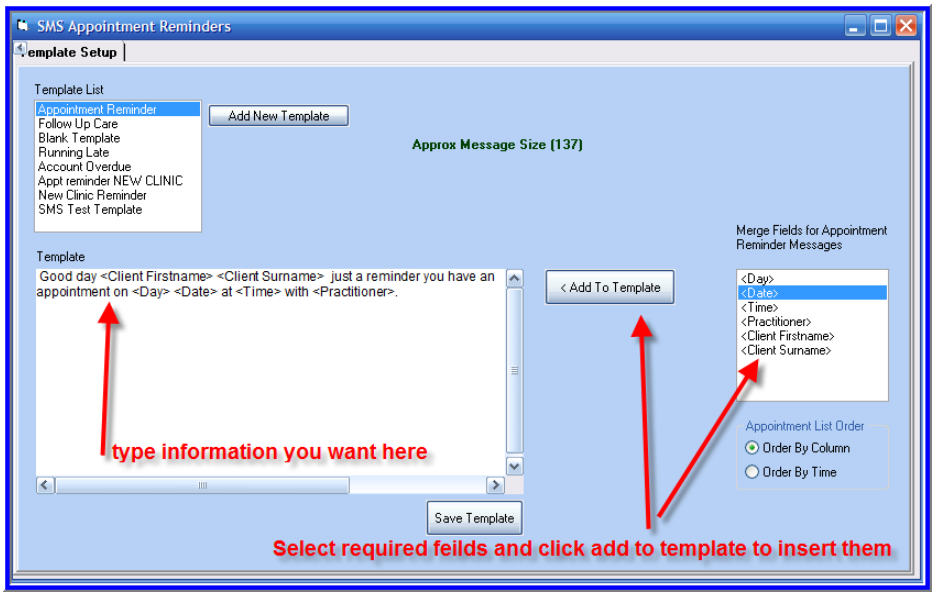
- Click Add New Template



- Click Add

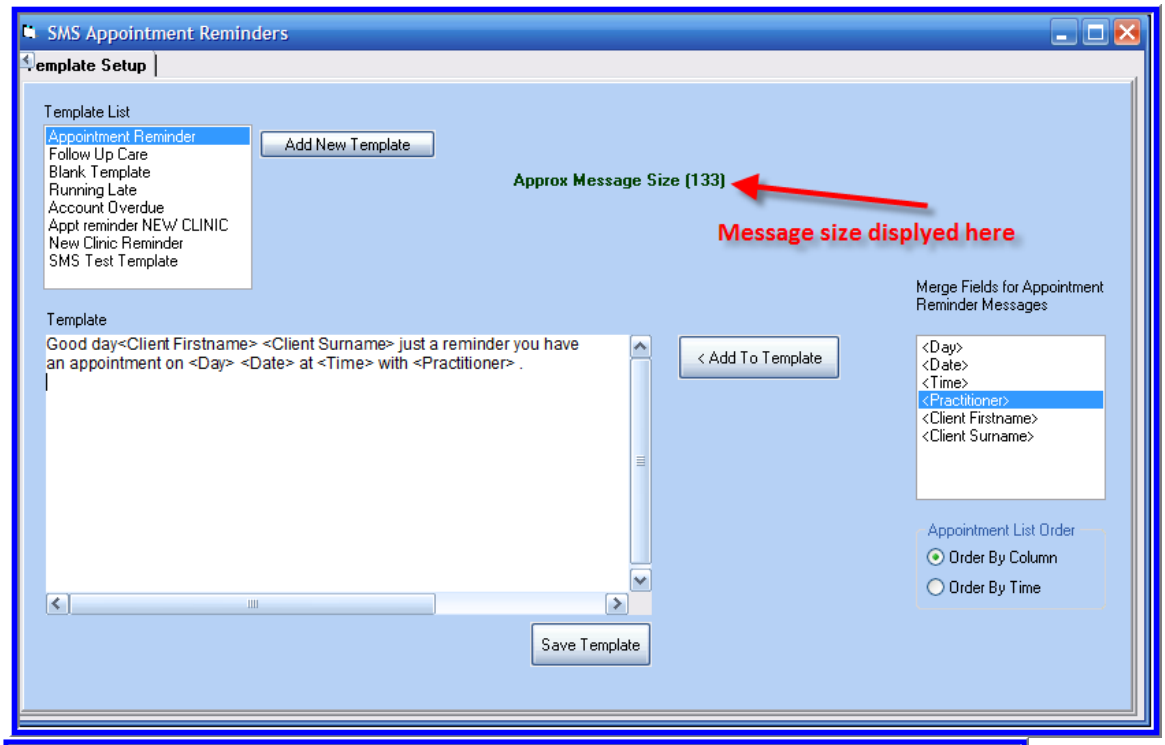


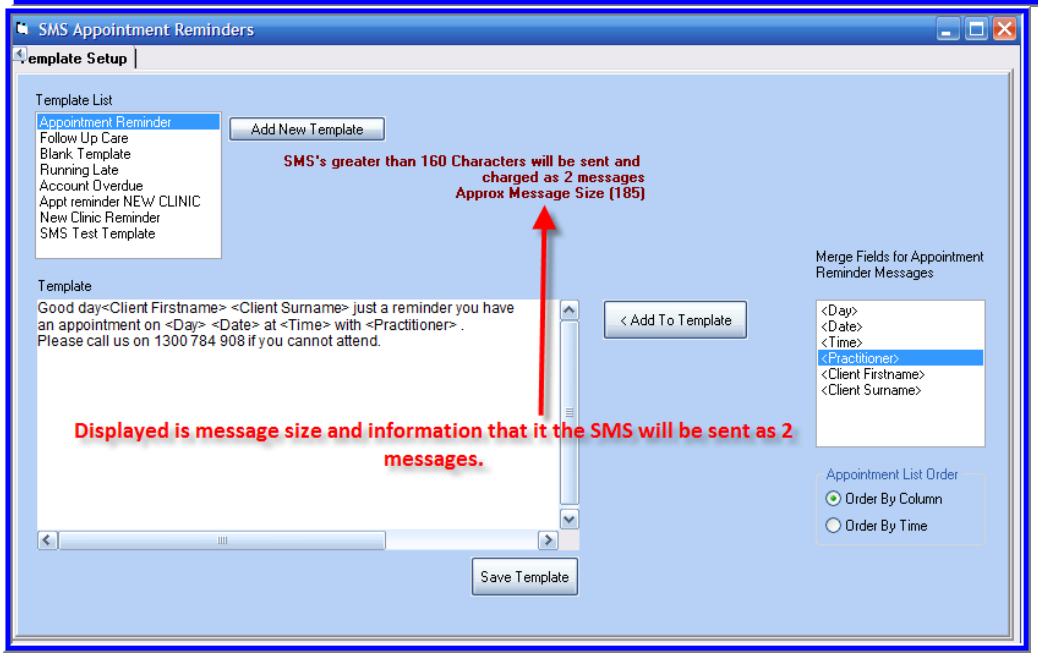
- Type in title for new SMS template
- Click save



- Select the template in the list you want to setup and type in the information you require.
- Click save template.

NB: The Approximate message size will also be displayed and how many messages you will be charged for (see examples below)

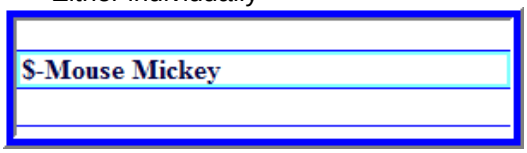

SMS Appointment Reminders
emplate Setup
Template List
Appointment Reminder
Follow Up Care
Blank Template
Running Late
Account Overdue
Appt reminder NEW CLINIC
New Clinic Reminder
SMS Test Template
Add New Template
Approx Message Size (133)
Message size displyed here
Merge Fields for Appointment Reminder Messages
Template
Good day<Client Firstname> <Client Surname> just a reminder you have an appointment on <Day> <Date> at <Time> with <Practitioner> .
< Add To Template
<Day>
<Date>
<Time>
<Practitioner>
<Client Firstname>
<Client Surname>
Appointment List Order
Order By Column
Order By Time
Save Template


SMS Appointment Reminders
emplate Setup
Template List
Appointment Reminder
Follow Up Care
Blank Template
Running Late
Account Overdue
Appt reminder NEW CLINIC
New Clinic Reminder
SMS Test Template
Add New Template
SMS's greater than 160 Characters will be sent and charged as 2 messages
Approx Message Size (185)
Merge Fields for Appointment Reminder Messages
Template
Good day<Client Firstname> <Client Surname> just a reminder you have an appointment on <Day> <Date> at <Time> with <Practitioner> .
Please call us on 1300 784 908 if you cannot attend.
< Add To Template
<Day>
<Date>
<Time>
<Practitioner>
<Client Firstname>
<Client Surname>
Displayed is message size and information that it the SMS will be sent as 2 messages.
Appointment List Order
Order By Column
Order By Time
Save Template

31.2 How to send an SMS

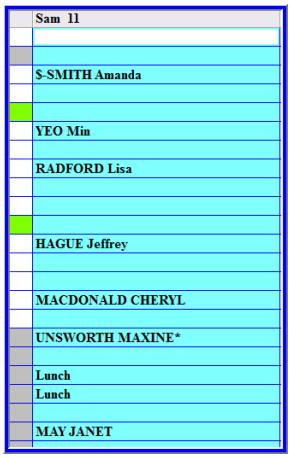
There are a number of ways to send an SMS.

- First select the patient or patients you with to send an SMS to.
- Either individually

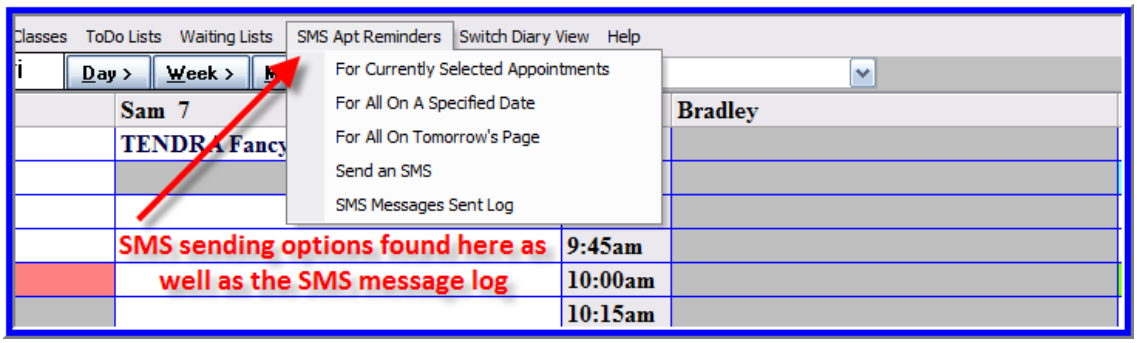


OR

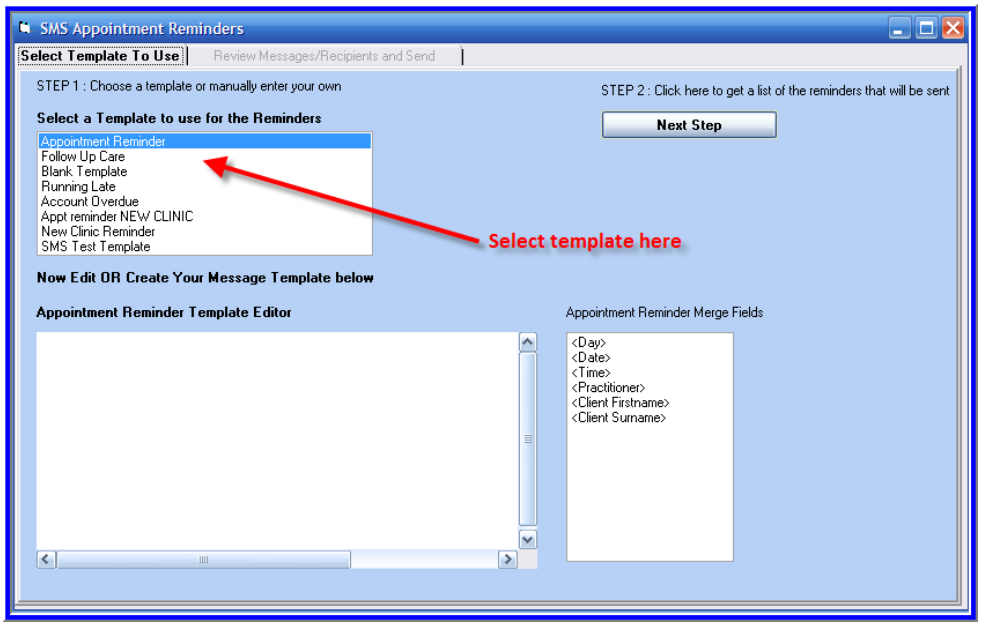
- Select the whole column by clicking on the practitioner name. (The whole column will be highlighted.)



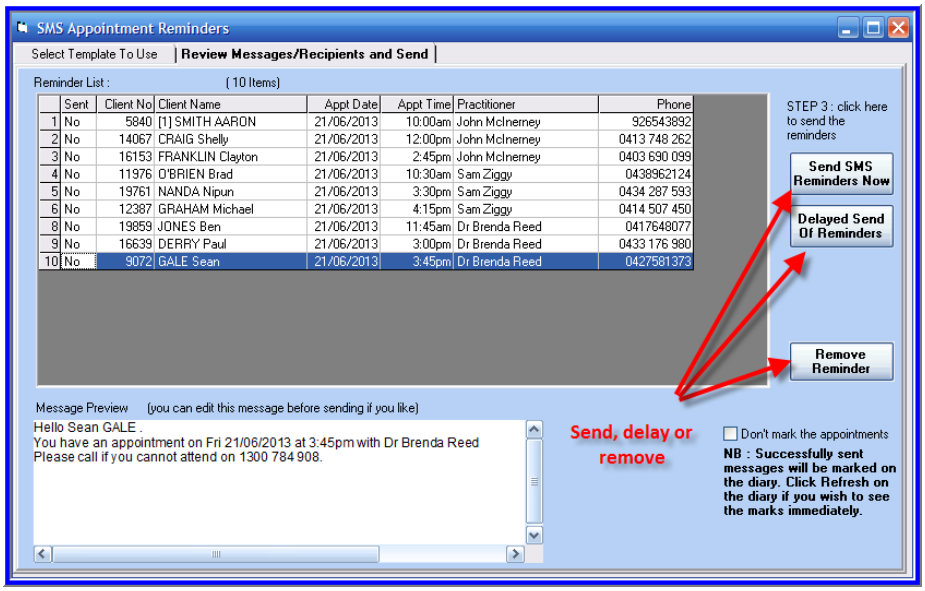
- Next on the PPMP® Diary page you will see the menu SMS Apt Reminders.



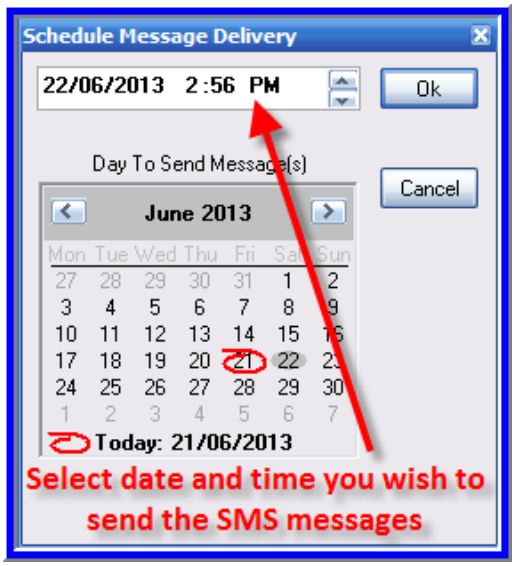
- The top 3 options will bring you up the template window that you have already set up.


SMS Appointment Reminders
Select Template To Use
Review Messages/Recipients and Send
STEP 1 : Choose a template or manually enter your own
Select a Template to use for the Reminders
Appointment Reminder
Follow Up Care
Blank Template
Running Late
Account Overdue
Appt reminder NEW CLINIC
New Clinic Reminder
SMS Test Template
Select template here
STEP 2 : Click here to get a list of the reminders that will be sent
Next Step
Now Edit OR Create Your Message Template below
Appointment Reminder Template Editor
Appointment Reminder Merge Fields
<Day>
<Date>
<Time>
<Practitioner>
<Client Firstname>
<Client Surname>

- Select the specific template you would like to use (or you can build a new one if needed here)
- Click Next Step.


SMS Appointment Reminders
Select Template To Use
Review Messages/Recipients and Send
Reminder List : (10 Items)
Sent | Client No | Client Name | Appt Date | Appt Time | Practitioner | Phone
1 No 5840 [1] SMITH AARON 21/06/2013 10:00am John McInerney 926543892
2 No 14067 CRAIG Shelly 21/06/2013 12:00pm John McInerney 0413 748 262
3 No 16153 FRANKLIN Clayton 21/06/2013 2:45pm John McInerney 0403 690 099
4 No 11976 O'BRIEN Brad 21/06/2013 10:30am Sam Ziggy 0438962124
5 No 19761 NANDA Nipun 21/06/2013 3:30pm Sam Ziggy 0434 287 593
6 No 12387 GRAHAM Michael 21/06/2013 4:15pm Sam Ziggy 0414 507 450
8 No 19859 JONES Ben 21/06/2013 11:45am Dr Brenda Reed 0417648077
9 No 16639 DERRY Paul 21/06/2013 3:00pm Dr Brenda Reed 0433 176 980
10 No 9072 GALE Sean 21/06/2013 3:45pm Dr Brenda Reed 0427581373
STEP 3 : click here to send the reminders
Send SMS Reminders Now
Delayed Send Of Reminders
Remove Reminder
Message Preview (you can edit this message before sending if you like)
Hello Sean GALE .
You have an appointment on Fri 21/06/2013 at 3:45pm with Dr Brenda Reed
Please call if you cannot attend on 1300 784 908.
Send, delay or remove
Don't mark the appointments
NB : Successfully sent messages will be marked on the diary. Click Refresh on the diary if you wish to see the marks immediately.

- From here you can send the SMS messages straight away, delay them or remove specific clients from the list with the 3 buttons on the right hand side.
- If you are going to delay the sending of the SMS messages you will have a new menu open up.



- Select the date and time from here you wish the SMS messages to be sent.
- Click OK when happy with your selection

31.3 Sending bulk SMS messages to multiple clients

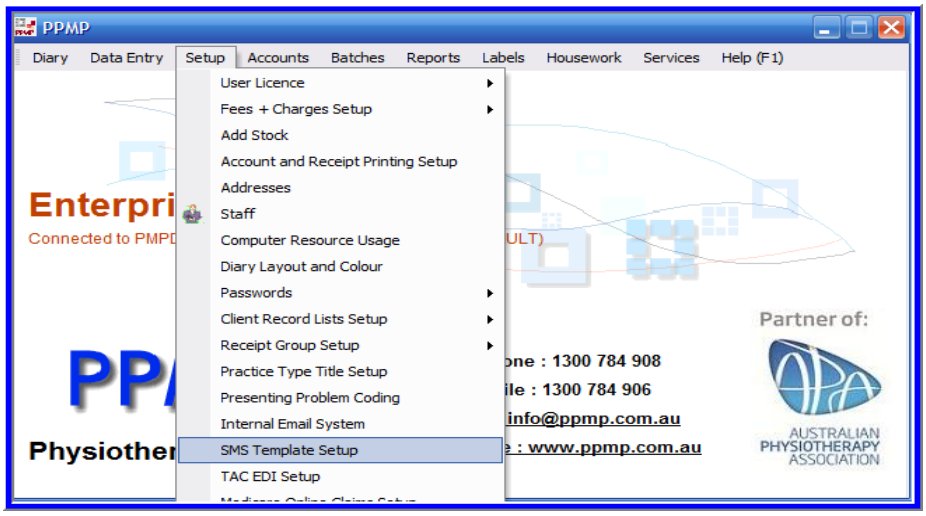
Click HERE to watch video

You have the ability within PPMP® to send bulk or group messages via sms at one time.
For example, you may like to send out a holiday specific message to all of your clients.
Remember the size of the template will depend on how many sms message are sent. (Anything over 160 characters will be charged and sent as 2 sms messages.)
Please check with us if you are sending over 1000 sms messages in a day as limits may apply.

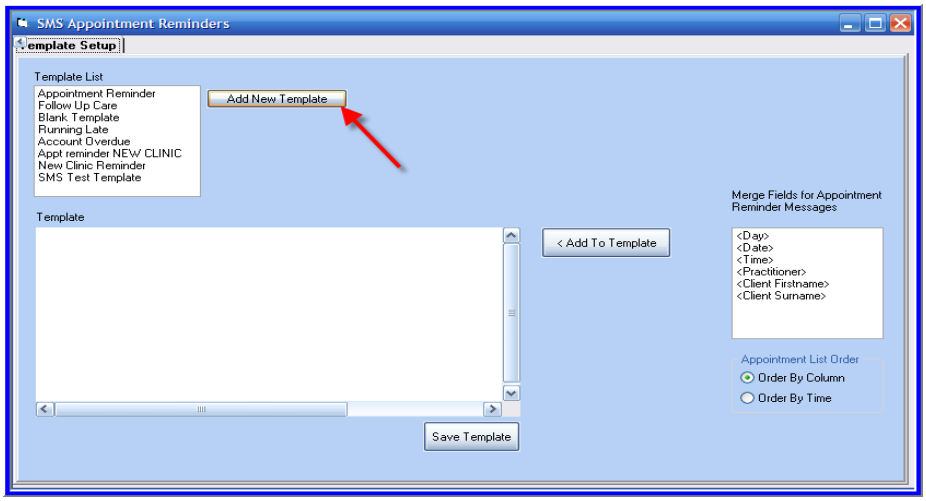
31.4 Design SMS templates and sending of SMS

First design the template to be used

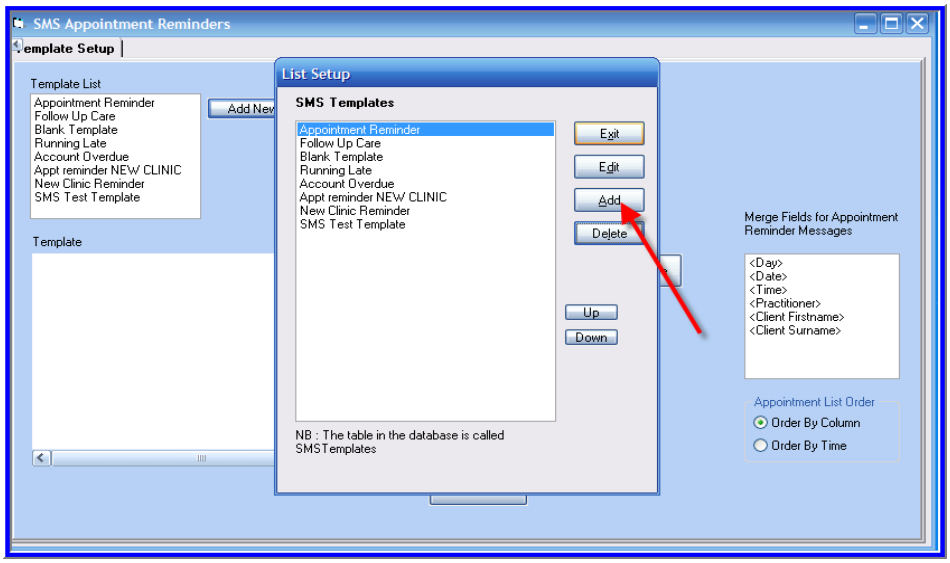
On the Main Menu PPMP®



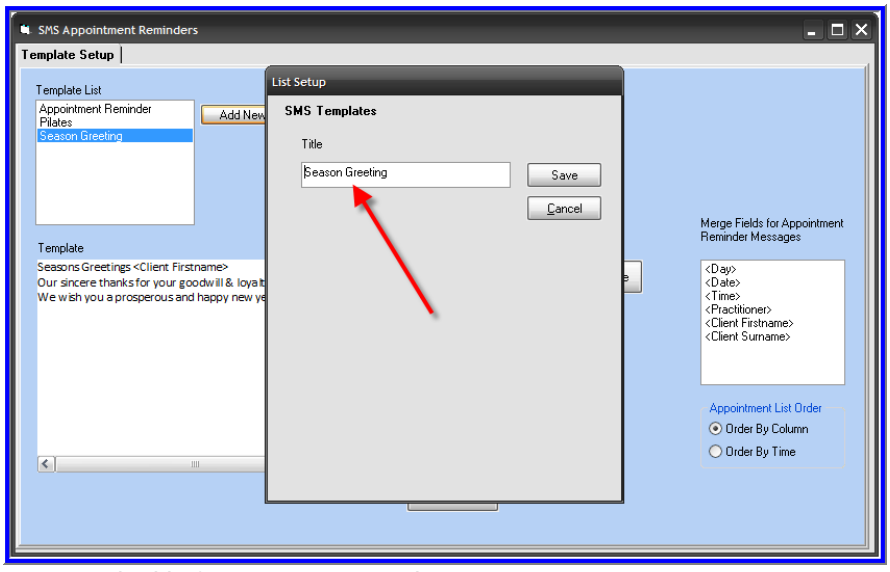
- Go to SMS Template Setup



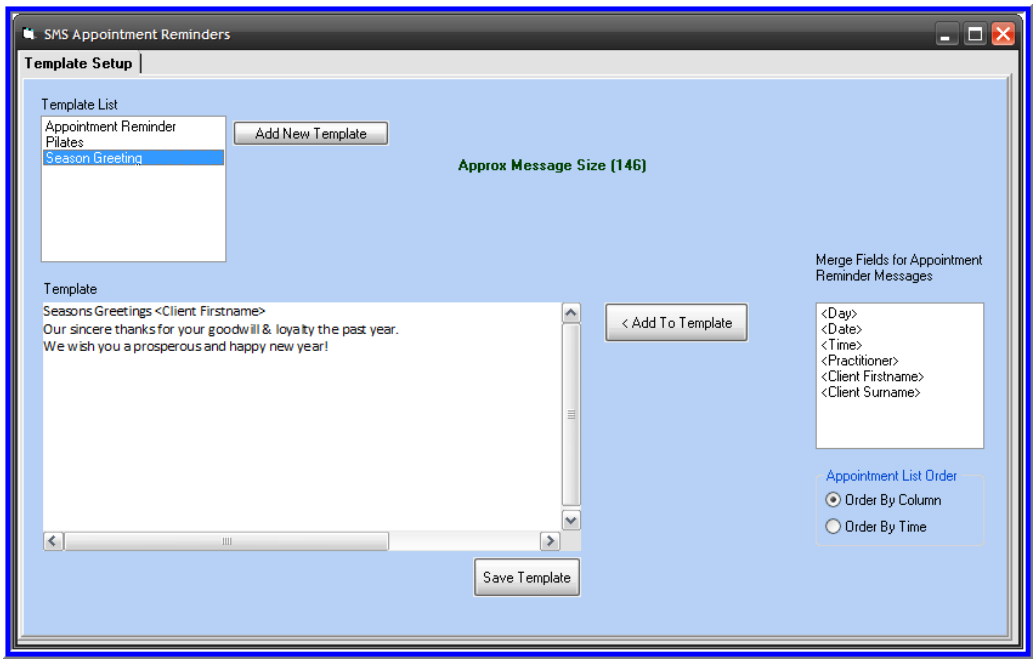
- Click Add New Template



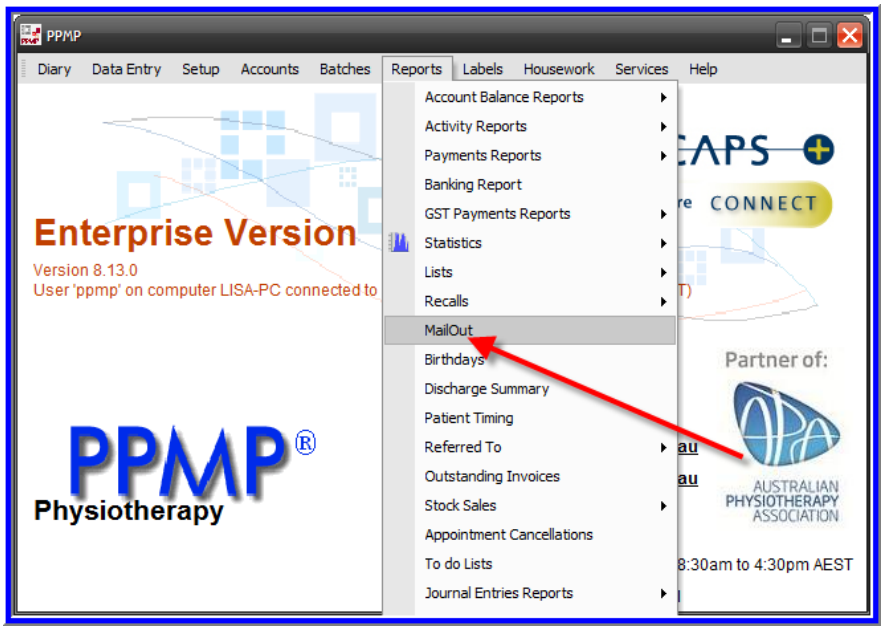
- Click Add



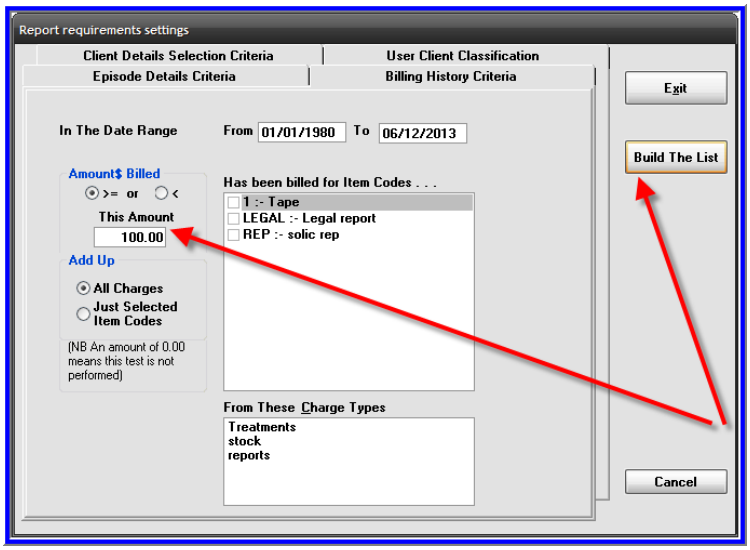
- Type in title for new SMS template
- Click save



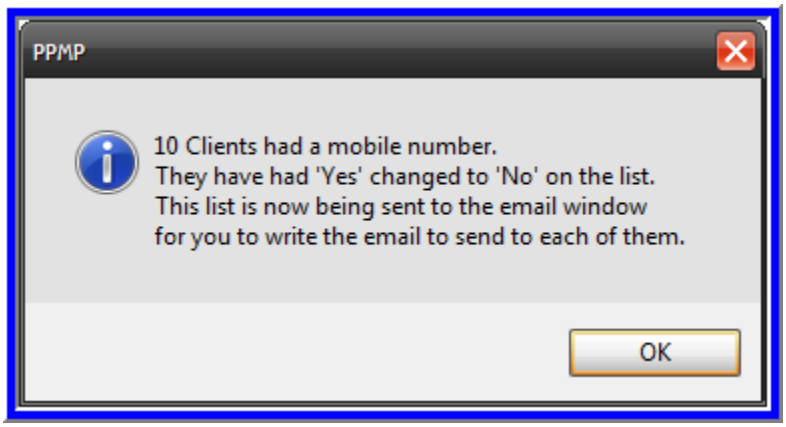
- Select the template in the list you want to setup and type in the information you require (or select from the merge fields on the right)
- Remember the size of the template will depend on how many sms message are sent. (Anything over 160 characters will be charged and sent as 2 sms messages.)
- Click save template.



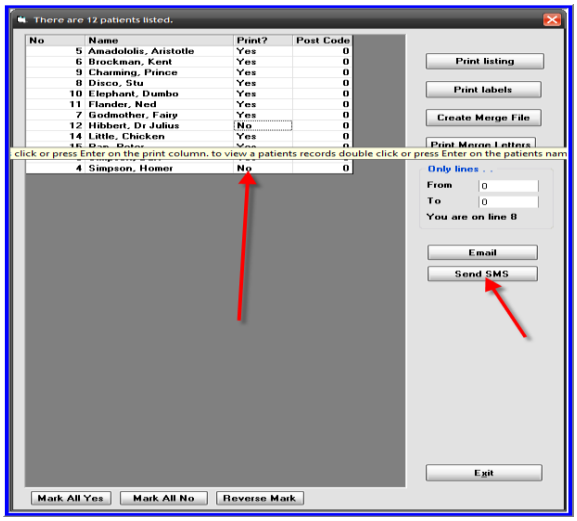
- Go to the reports screen and select the MailOut option



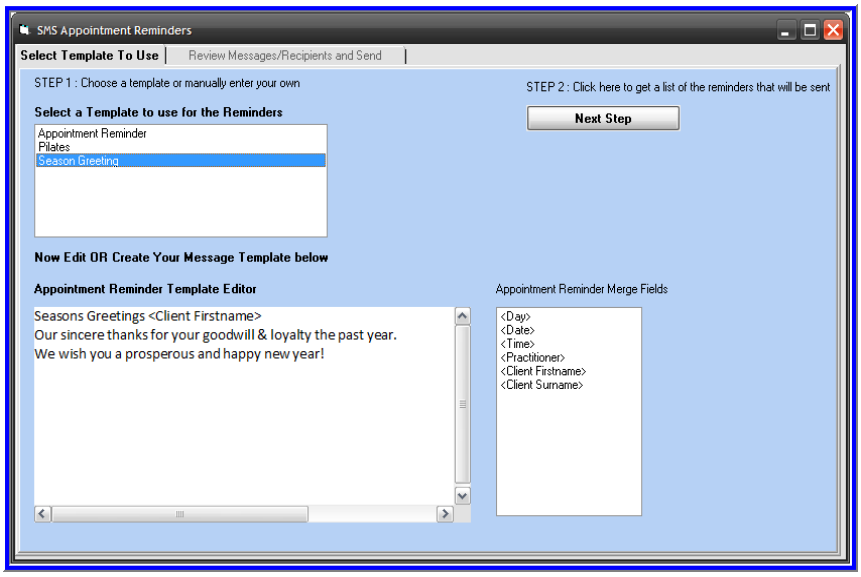
- Select the required Filters Tab / Fields
- Click Build List


PPMP
10 Clients had a mobile number.
They have had 'Yes' changed to 'No' on the list.
This list is now being sent to the email window
for you to write the email to send to each of them.
OK

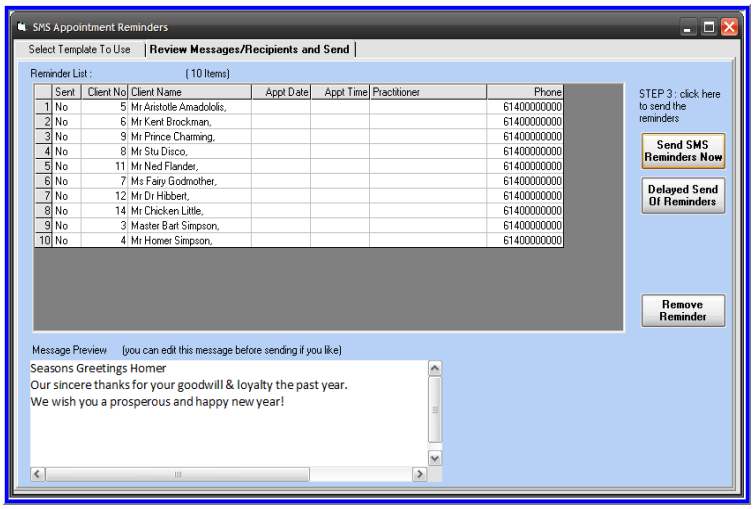
- You will receive a message telling you how many clients had mobile numbers
- Please check with us if you are sending over 1000 sms messages in a day as limits may apply.



- You will notice on your list that those who have mobile numbers have had Yes changed to NO (this is so those that don't have mobile numbers can be contacted by an altenate method)
- Click Send SMS

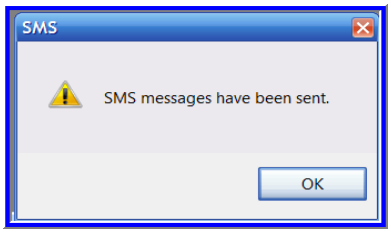

SMS Appointment Reminders
Select Template To Use
Review Messages/Recipients and Send
STEP 1 : Choose a template or manually enter your own
Select a Template to use for the Reminders
Appointment Reminder
Pilates
Season Greeting
STEP 2 : Click here to get a list of the reminders that will be sent
Next Step
Now Edit OR Create Your Message Template below
Appointment Reminder Template Editor
Seasons Greetings <Client Firstname>
Our sincere thanks for your goodwill & loyalty the past year.
We wish you a prosperous and happy new year!
Appointment Reminder Merge Fields
<Day>
<Date>
<Time>
<Practitioner>
<Client Firstname>
<Client Surname>

- Select your Template
- Click Next Step


SMS Appointment Reminders
Select Template To Use
Review Messages/Recipients and Send
Reminder List :
(10 Items)
Sent
Client No
Client Name
Appt Date
Appt Time
Practitioner
Phone
1 No 5 Mr Aristotle Amadololis, 61400000000
2 No 6 Mr Kent Brockman, 61400000000
3 No 9 Mr Prince Charming, 61400000000
4 No 8 Mr Stu Disco, 61400000000
5 No 11 Mr Ned Flander, 61400000000
6 No 7 Ms Fairy Godmother, 61400000000
7 No 12 Mr Dr Hibbert, 61400000000
8 No 14 Mr Chicken Little, 61400000000
9 No 3 Master Bart Simpson, 61400000000
10 No 4 Mr Homer Simpson, 61400000000
STEP 3 : click here to send the reminders
Send SMS Reminders Now
Delayed Send Of Reminders
Remove Reminder
Message Preview
(you can edit this message before sending if you like)
Seasons Greetings Homer
Our sincere thanks for your goodwill & loyalty the past year.
We wish you a prosperous and happy new year!

- Make sure ALL mobile numbers are in the correct format (it makes no difference if you have “61” at the beginning or if you have spaces “0400 000 000”)

- Once you have checked the mobile numbers and you have selected the correct template – Click Send



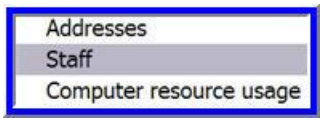
- You will receive the above message when SMS’s have been sent

32 Staff setup (additional information)

Click HERE to watch video

On the main PPMP® Screen

- Click Setup



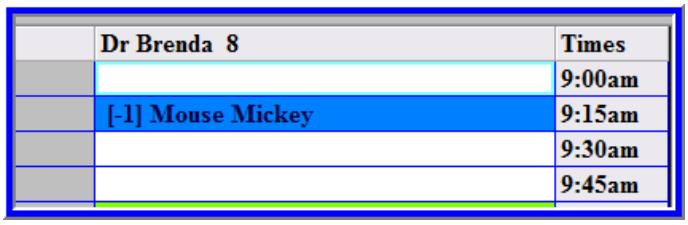
- Click on Staff (we have already setup most of this in the wizard setup).

- In Name to show on Accounts we need to insert the Practitioners Surname and Provider Number

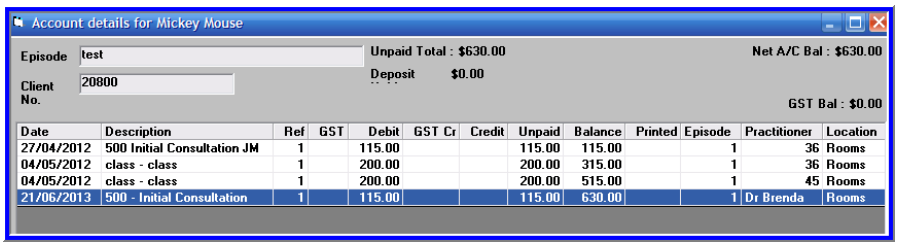
- Click Save

- Click Exit.

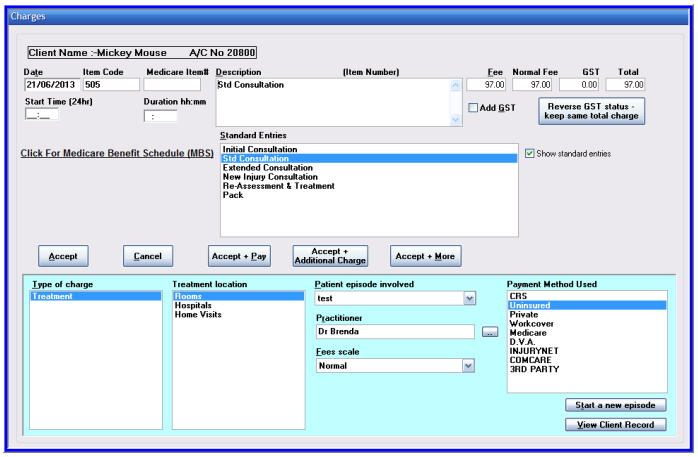
32.1 Setting staff names on columns



- At the top of each column the name of the practitioners using that column should appear.
- The name or staff member at the top of each diary column indicates who is being credited with the work being done in that column.


Account details for Mickey Mouse
Episode test
Client No. 20800
Unpaid Total : $630.00
Deposit $0.00
Net A/C Bal : $630.00
GST Bal : $0.00
Date Description Ref GST Debit GST Cr Credit Unpaid Balance Printed Episode Practitioner Location
27/04/2012 500 Initial Consultation JM 1 115.00 115.00 115.00 1 36 Rooms
04/05/2012 class - class 1 200.00 200.00 315.00 1 36 Rooms
04/05/2012 class - class 1 200.00 200.00 515.00 1 45 Rooms
21/06/2013 500 - Initial Consultation 1 115.00 115.00 630.00 1 Dr Brenda Rooms

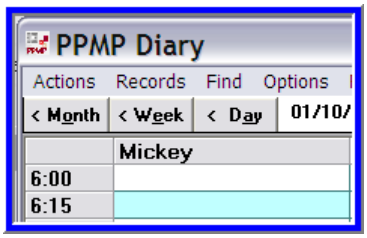
- When you record a treatment from the diary, the practitioner whose name appears at the top of that column is credited with having treated that patient.



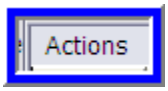
- When you are in the charge window you will see a setting at the bottom of the charge window for the practitioner, episode, etc. these can be changed by clicking on drop down buttons or clicking on a different location.

32.2 Changing practitioner on the diary

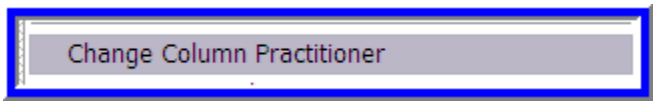
You can change the name allocated to a particular column on a particular day.



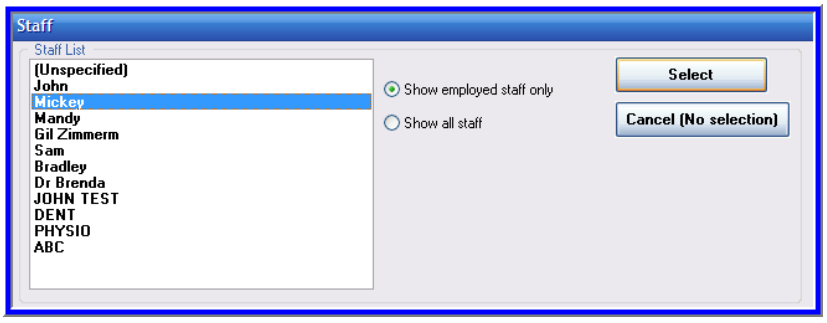
- Click in the first column.



- Then click Actions



- Change Column Practitioner



- Click on the practitioner's name then click 'Select'

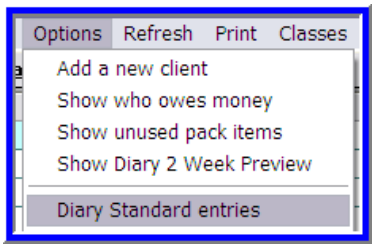
- The name will then appear on the diary in that column on that day.

33 Standard entries

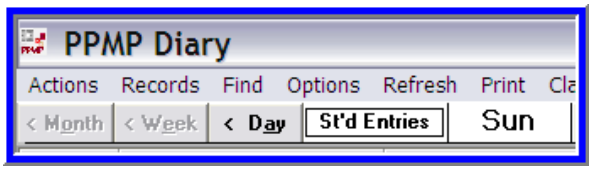
Click HERE to watch video

Setting up a standard or default diary layout

Naturally you won't want to have to allocate every column on every day manually. The diary has a standard layout facility. From within the diary:-
From the Diary - Click on "Options"

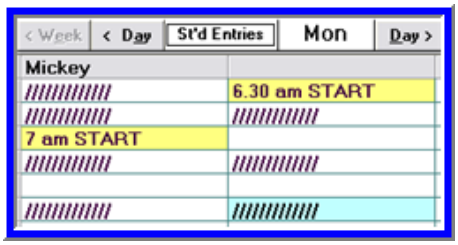


- Choose Diary Standard entries

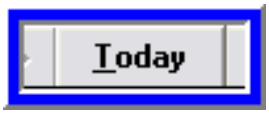


- The diary will jump to the Sunday of the standard layout area.

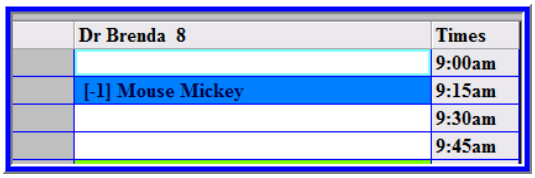
- Allocate staff to each column on each day from that Sunday through to the following Saturday.



- You can also fill in the middle parts of the diary pages reserve signs (Actions -> Reserve) perhaps notes like Start Times etc., as you would to layout an appointment book.



- Click on the 'Today' button.
- These will then become the default settings unless you override them by directly selecting a practitioner for a particular day.

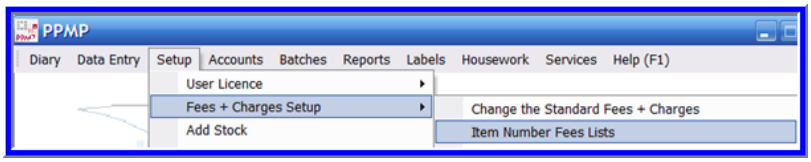


- NB These changes will only be reflected in days more than 14 days in the future from today. Days on the diary more recent than that will need to be individually adjusted

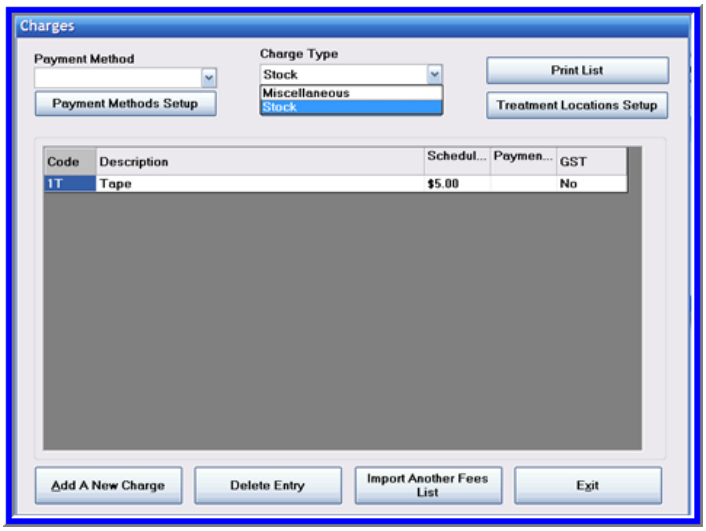
34 Stock - Additional fees & charges

Click HERE to watch video

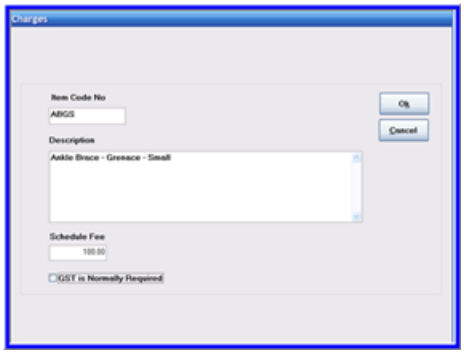
Main Menu PPMP®



- Click Setup
- Click Fees & Charges Setup
- Click Item Number Fees List (This is where you set up your stock list)



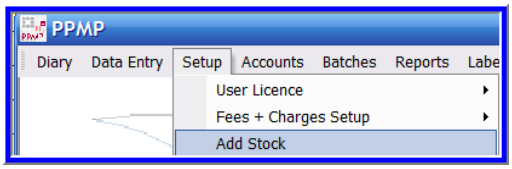
- Make sure you select the correct “Charge Type”
- Click Add a New Charge



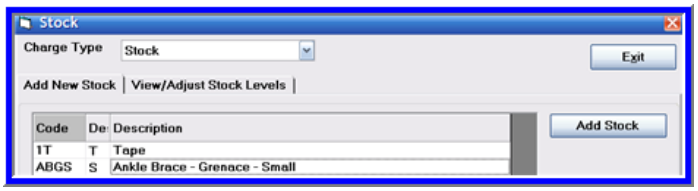
- Build your list of stock items
- Give each stock item an Item Code No (abbreviated description)
- Tick the GST box if you want this item to automatically have GST added each time that it is used.
- You can add stock in, and as you use this item to sell stock it will reduce the level on hand.

34.1 Add stock amounts

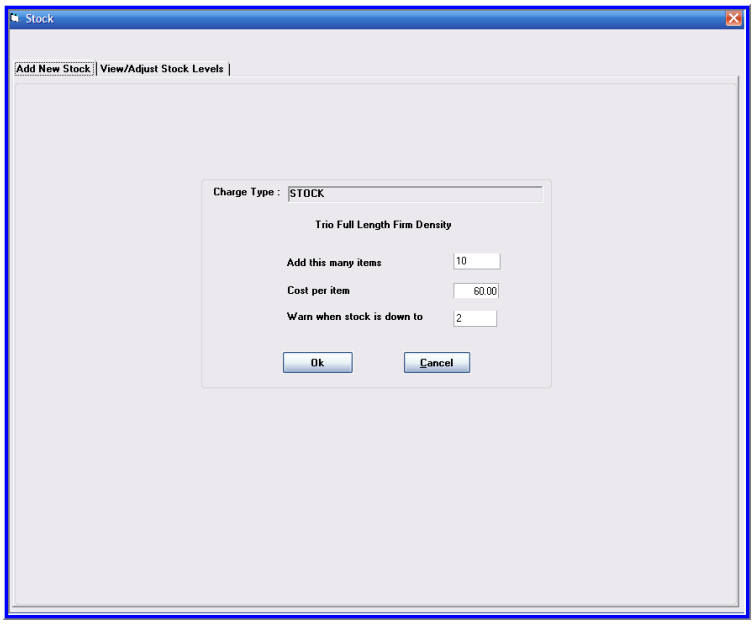
Main Menu PPMP®



- Click Setup
- Click Add Stock (this will bring up the Add Stock window)



- Firstly make sure the charge type at the top is correct
- Select the item you wish to add stock too, by highlighting it.
- Click on the **'Add Stock'** button and enter the information into the fields as follows.



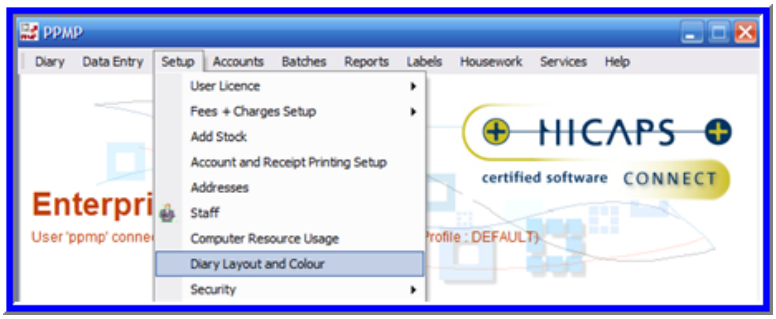
- **Add this many items** - In this field you add the number of stock you have just received.
- **Cost per item** - In this field enter the cost **you paid** for each item.
- **Warn when stock is down to** - In this field you enter the number of stock at which you wish to be warned that the number of items in stock is at a low level and need to be re-ordered.

To reduce the stock level for an item - add a negative number of stock items.

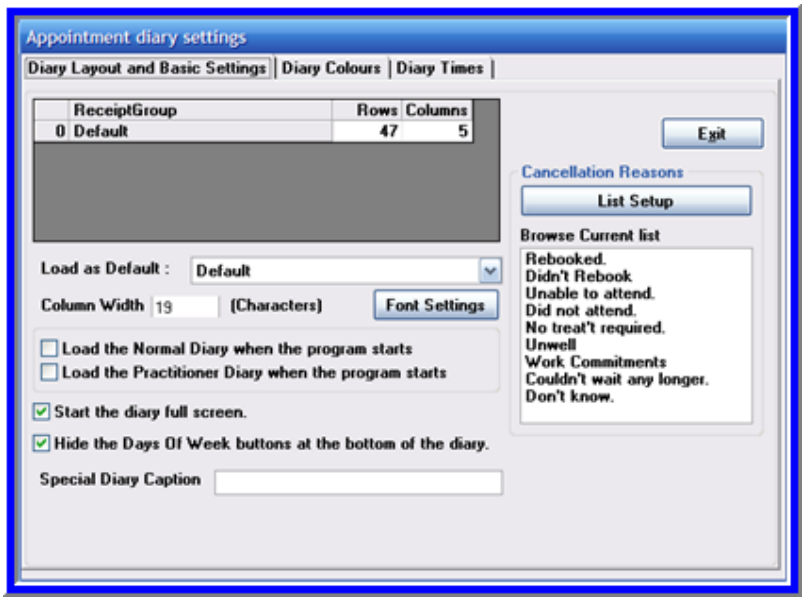
On the reports menu you will see reports listed for stock items, sales, and stock on hand etc.

35 Times columns - adjusting/inserting

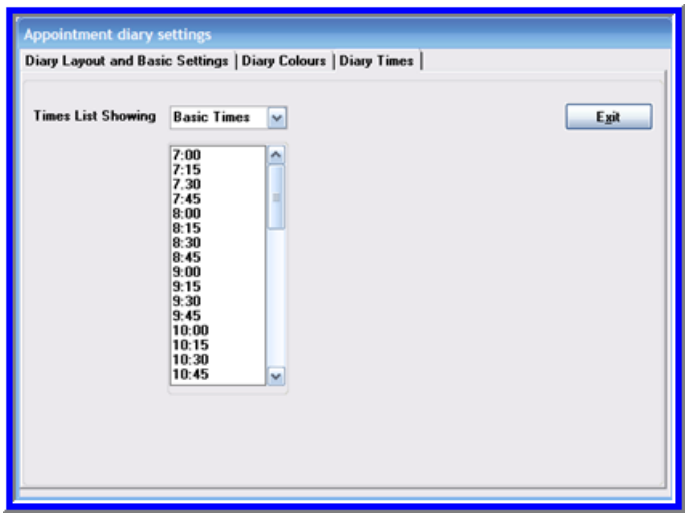
From the Main screen of PPMP



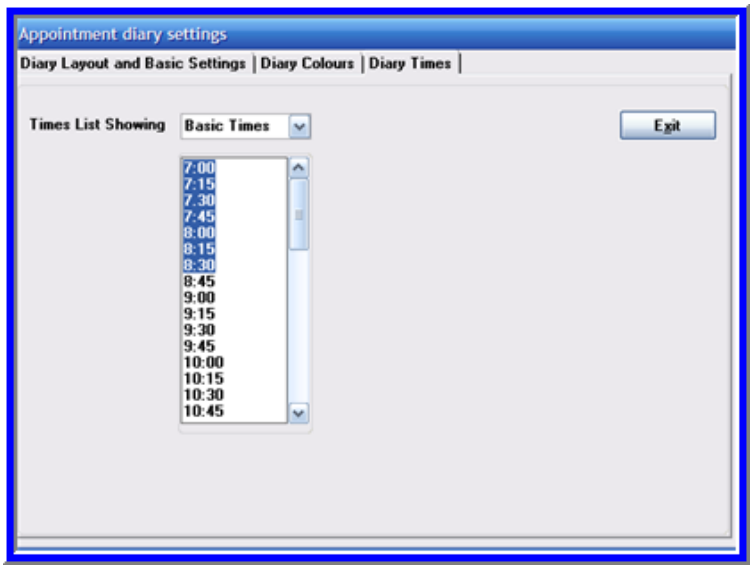
- Go to Setup
- Diary Layout & Colour



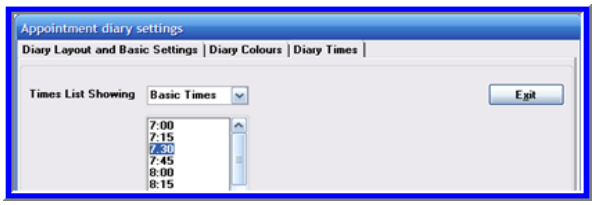
- Add Additional Columns or Rows
- Click on Diary Times Tab



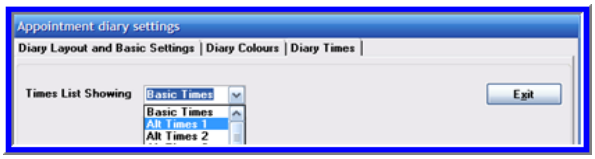
- The Basic Times column relate to the times on the left hand side of your diary
- You can adjust the times by inserting or deleting times



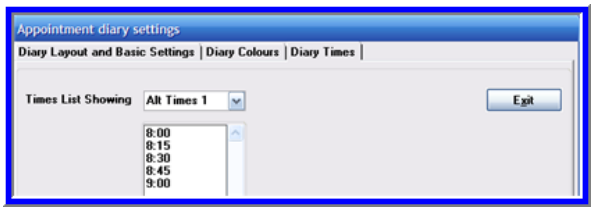
- Highlight a group and Delete



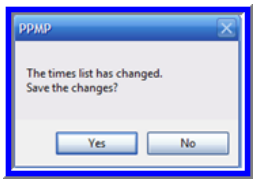
- Or highlight individual times and Delete
- Or over ride with new times



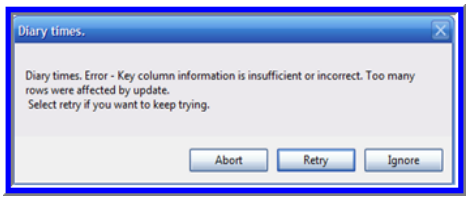
- Click on drop down arrow and select an Alternate Times



- Add the times you want (10 mins, 15 mins, etc)
- Click Exit (when you have finished inserting/deleting times)



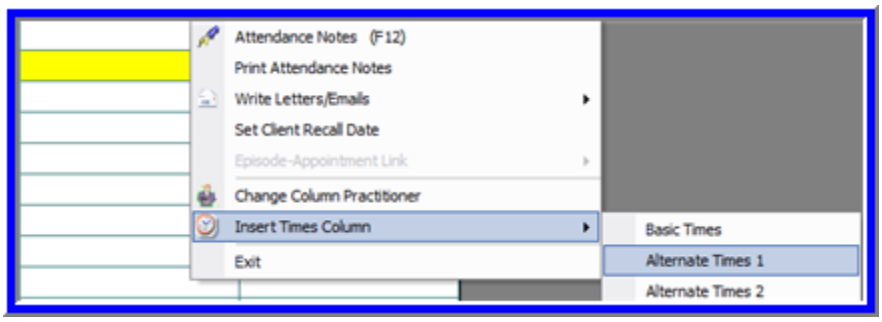
- Click Yes


Diary times.
Diary times. Error - Key column information is insufficient or incorrect. Too many rows were affected by update.
Select retry if you want to keep trying.
Abort
Retry
Ignore

- Click Ignore
- Open PPMP

Insert an Additional Times Column

NB: Please note that when inserting a “Times Column” make sure the column is completely empty (no appointments or notes).



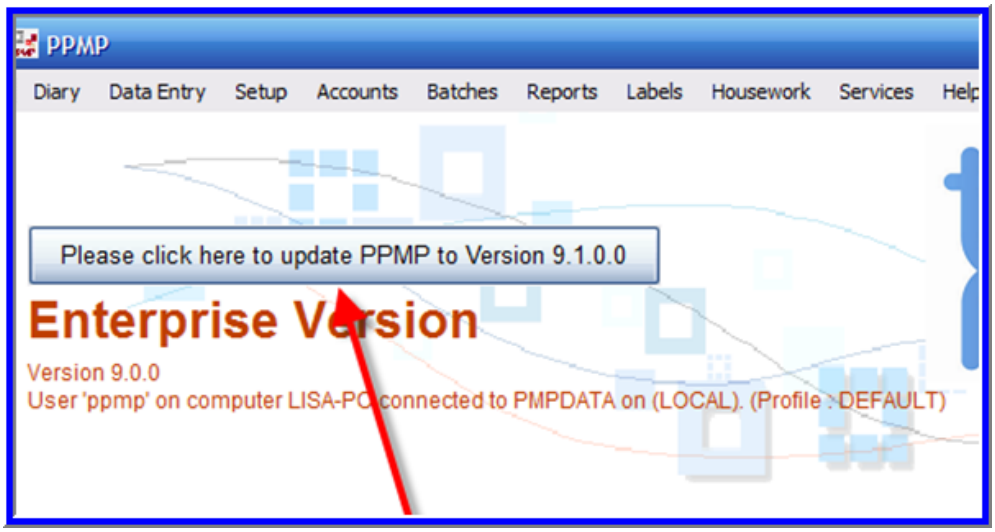
- Right click in the column you want to make a “Times Column”
- Select Insert Times Column
- Select Alternate Times (that you created)

36 Upgrade PPMP®

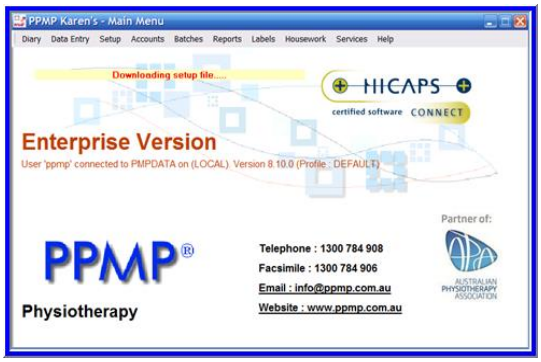
(MAKE SURE ALL OTHER APPLICATIONS ARE CLOSED - Including any Word documents, emails, etc.)

When an update is available for PPMP® the main screen of PPMP with display the

On the Main Screen of PPMP®



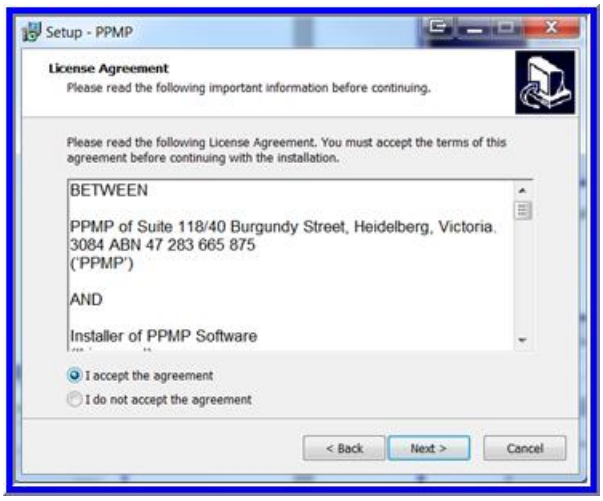
- Click Help
- Select Check for Updates



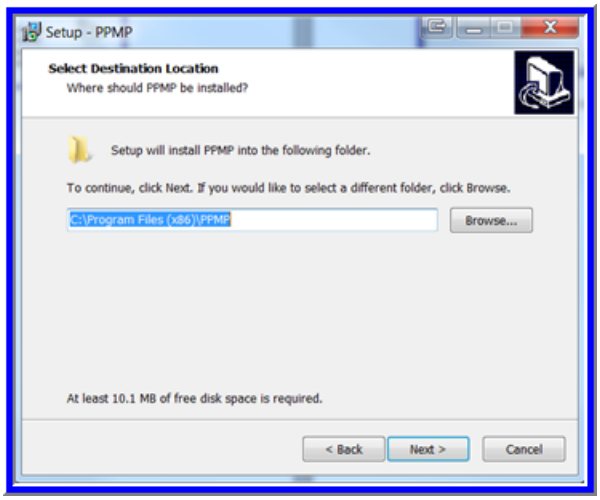
- Program is connecting to PPMP® Server & Downloading Files

Setup - PPMP
Welcome to the PPMP Setup Wizard
This will install PPMP version 8.11.0.0 on your computer.
It is recommended that you close all other applications before continuing.
Click Next to continue, or Cancel to exit Setup.
Next >
Cancel

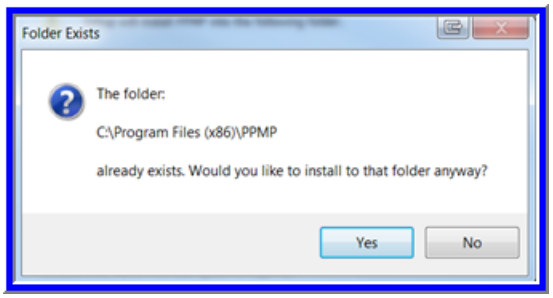
- Welcome Wizard will display PPMP® Version number that will be installed on your computer
- Click Next


Setup - PPMP
License Agreement
Please read the following important information before continuing.
Please read the following License Agreement. You must accept the terms of this agreement before continuing with the installation.
BETWEEN
PPMP of Suite 118/40 Burgundy Street, Heidelberg, Victoria. 3084 ABN 47 283 665 875 ('PPMP')
AND
Installer of PPMP Software
I accept the agreement
I do not accept the agreement
< Back
Next >
Cancel

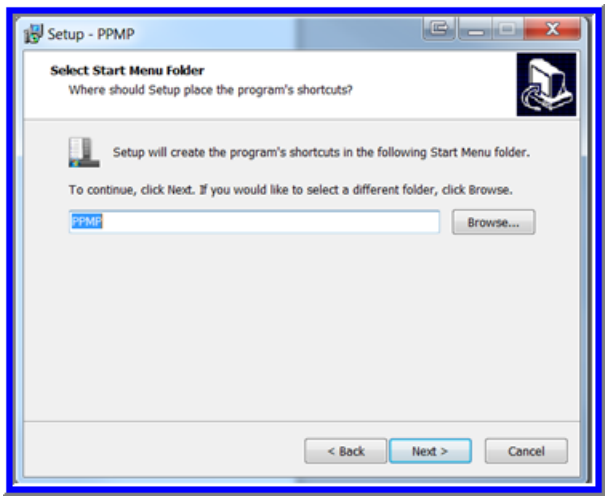
- Click I Accept the Agreement
- Click Next


Setup - PPMP
Select Destination Location
Where should PPMP be installed?
Setup will install PPMP into the following folder.
To continue, click Next. If you would like to select a different folder, click Browse.
C:\Program Files (x86)\PPMP
Browse...
At least 10.1 MB of free disk space is required.
< Back
Next >
Cancel

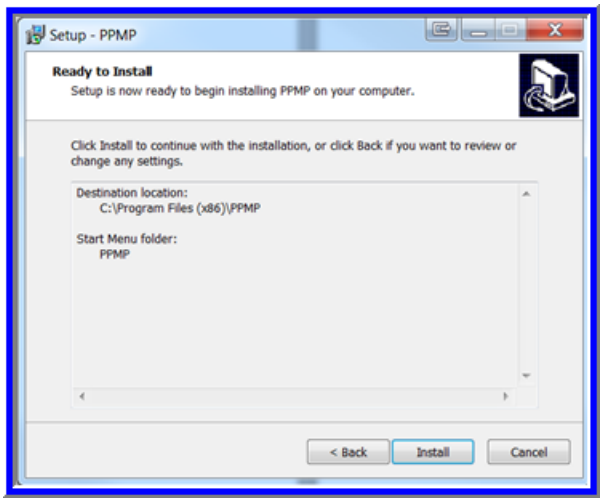
- Click Next



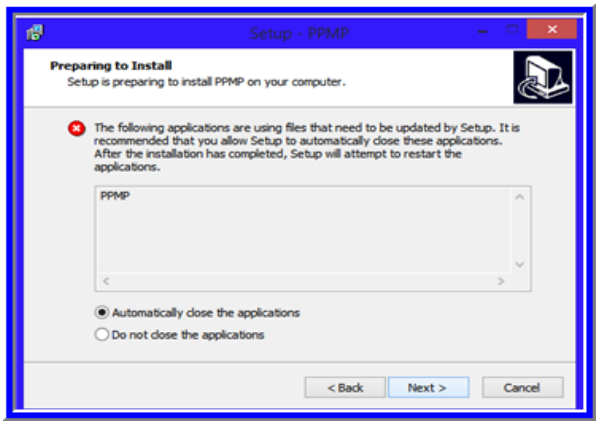
- Click Yes


Setup - PPMP
Select Start Menu Folder
Where should Setup place the program's shortcuts?
Setup will create the program's shortcuts in the following Start Menu folder.
To continue, click Next. If you would like to select a different folder, click Browse.
PPMP
Browse...
< Back
Next >
Cancel

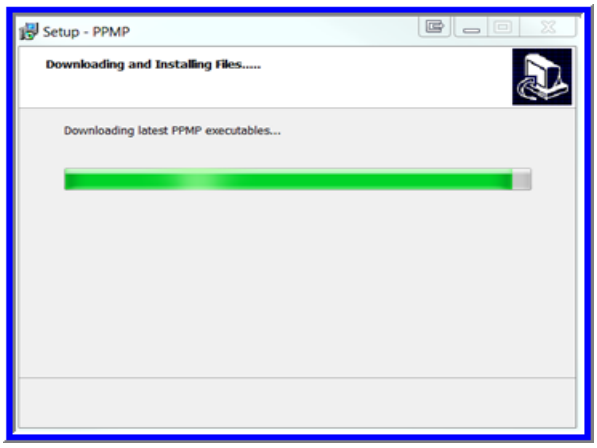
- Click Next


Setup - PPMP
Ready to Install
Setup is now ready to begin installing PPMP on your computer.
Click Install to continue with the installation, or click Back if you want to review or change any settings.
Destination location:
C:\Program Files (x86)\PPMP
Start Menu folder:
PPMP
< Back
Install
Cancel

- Click Install


Setup - PPMP
Preparing to Install
Setup is preparing to install PPMP on your computer.
The following applications are using files that need to be updated by Setup. It is recommended that you allow Setup to automatically close these applications. After the installation has completed, Setup will attempt to restart the applications.
PPMP
Automatically close the applications
Do not close the applications
< Back
Next >
Cancel

- Click Next



- Downloading and installing files ... please wait

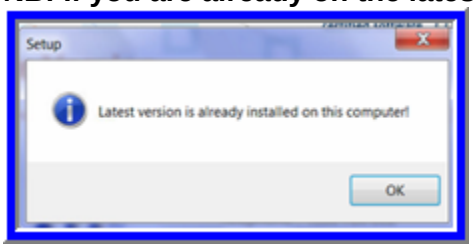
Setup - PPMP
Completing the PPMP Setup Wizard
Setup has finished installing PPMP on your computer. The application may be launched by selecting the installed icons.
Click Finish to exit Setup.
Finish

- Click Finish

Open PPMP®

- Please Note the New Version number on the Main Screen of PPMP®

NB: If you are already on the latest Version you will receive the following information

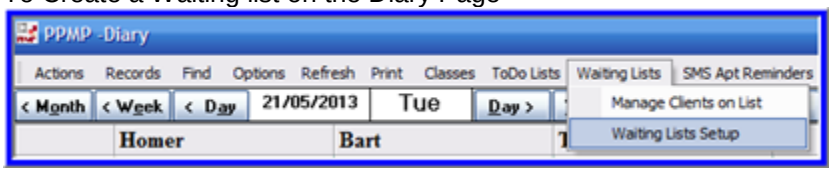


- Click OK

37 Waiting lists

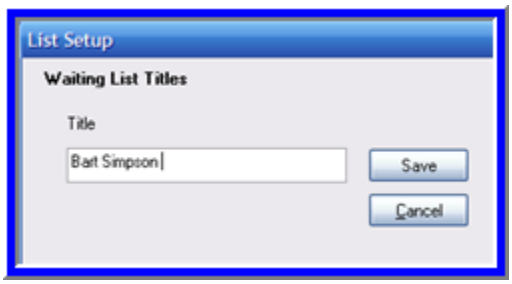
Click HERE to watch video

To Create a Waiting list on the Diary Page

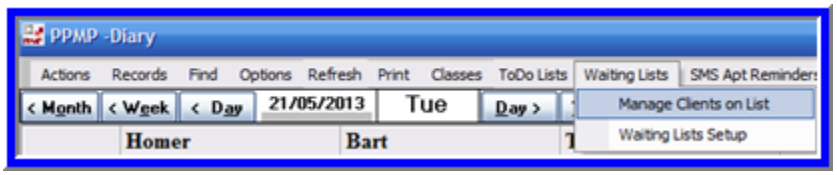


- Go to Waiting Lists
- Waiting Lists Setup

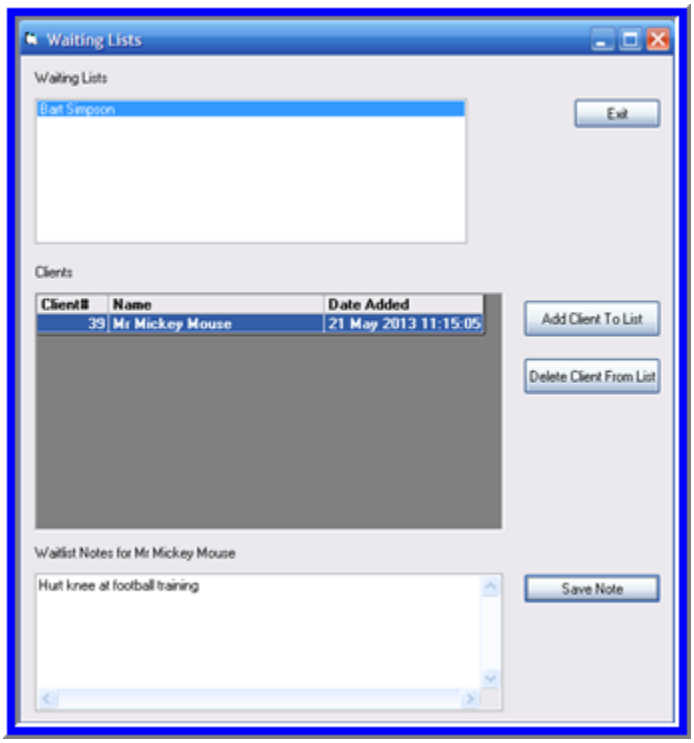
- Click Add



- Enter in List Name
- Click Save
- Exit



- On the Diary Page
- Click Waiting Lists
- Manage Clients on List

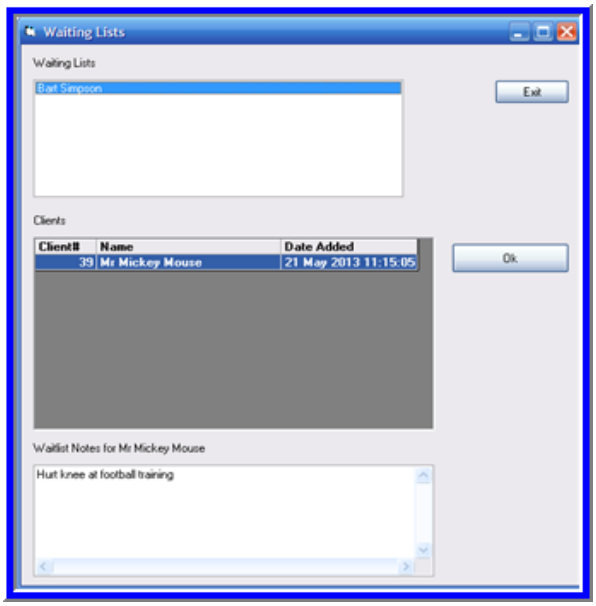


- Select Waiting List Title
- Click Add Client to List
- Add any notes referring to this client
- Click Save Notes
- Exit

When Appointment becomes available

- Select Appointment Time on Diary

- Click Actions
- Select Appointment from Waiting List



- Select List Title
- Select Client
- Click OK

- Client is transferred from Waiting List to Appointment on the Diary